

**MARKET STUDY
OF
ALTERNATIVE DEVELOPMENT
STANDARDS**

for

**Regional Municipality of Ottawa-Carleton
111 Lisgar Street
Ottawa, Ontario.
K2P-2L7**

**BRETHOUR RESEARCH ASSOCIATES LIMITED,
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TABLE OF CONTENTS

PAGE #**EXECUTIVE SUMMARY****PART I STUDY BACKGROUND**

1.0 INTRODUCTION	1
1.1 BACKGROUND	1
1.2 OBJECTIVE OF STUDY	3
2.0 STUDY METHODOLOGY	
2.1 STUDY CHALLENGE	4
2.2 HOME SALES OVERVIEW	4
2.3 COMPARATIVE SITE SALES REVIEW	4
2.4 BUILDER OPINION SURVEY	5
2.5 CONSUMER OPINION SURVEYS	5
2.5.1 Buyer Seminar Questionnaire	6
2.5.2 Focus Groups	7

PART II STUDY RESULTS

3.0 SMALL HOUSING SALES REVIEW	8
3.1 HISTORICAL MARKET REVIEW	8
3.2 REVIEW OF SELECTED SITES	11
3.3 NEW VERSUS RESALE	13
3.4 CURRENT TRENDS, BUYER PROFILES AND MARKET NICHES	15
3.5 MARKET DEPTH AND AFFORDABILITY FACTORS	16
4.0 ANALYSIS OF CONSUMER OPINION	19
4.1 SURVEY VEHICLES - RESPONSES & SIGNIFICANCE	19
4.1.1 Questionnaire Response Rates	20
4.1.2 Significance of the Sample	20
4.1.3 Focus Groups	21
4.2 THE SAMPLE GROUP	21
4.2.1 Demographic Profiles	22
4.2.2 Current Housing Situation	24

4.3	HOUSING EXPECTATIONS	25
4.3.1	Type of Home	26
4.3.2	Size of Home	27
4.3.3	Bedrooms and Bathrooms	29
4.3.4	A "Grow Home" and Other Features	31
4.3.5	Location	32
4.3.6	Financial Considerations	35
4.4	ALTERNATIVE DEVELOPMENT STANDARDS	37
4.4.1	Likelihood to Purchase Total Package	39
4.4.1.1	Single Family	39
4.4.1.2	Townhomes	41
4.4.2	Likelihood to Purchase by Component	42
4.4.3	Acceptance of Each ADS Component and the total ADS Package	45
4.5	COMMUNITY FORM AND HOUSING CHARACTERISTICS	46
4.5.1	The Community	47
4.5.1.1	Neighbourhood Facilities	47
4.5.1.2	Land Use Mix	49
4.5.1.3	Intensification	49
4.5.2	House Design	51
4.5.2.1	Single Family Homes	52
4.5.2.2	Bungalows	52
4.5.2.3	Townhomes	53
5.0	CONCLUSIONS: A MARKETING STRATEGY	54
5.1	SUMMARY OF CONSUMER OPINION	54
5.2	TARGET MARKETS AND BUYER PROFILES	55
5.3	RECOMMENDED PROJECT SPECIFICATIONS	57
5.4	PRICING RECOMMENDATIONS	59
5.5	STRATEGIES FOR SUCCESS	62

LIST OF TABLES

Table 1.	Ottawa-Carleton Housing Market
Table 2.	Ottawa-Carleton MLS Resales
Table 3.	New Home Completions under \$160,000
Table 4.	Multiple Family New Home Sales
Table 5.	Expected Home Type and Current Housing Situation
Table 6.	Expected Home Size and Current Housing Situation
Table 7.	Current and Expected Residence Location
Table 8.	Dollar Value Savings of ADS
Table 9.	Who Would Purchase an ADS Single
Table 10.	Who Would Purchase an ADS Townhome
Table 11.	Likelihood to Purchase by each ADS Component
Table 12.	Neighbourhood Facilities
Table 13.	Buyer Profiles and Housing Preferences
Table 14.	Buyer Profiles and Likelihood to an ADS Home
Table 15.	Sample Project Specifications
Table 16.	Recommended "ADS" Pricing Schedule Inside the Greenbelt
Table 17.	Recommended "ADS" Pricing Schedule Outside the Greenbelt

APPENDICES

- Appendix 1. The Survey Instrument
- Appendix 2. Graphic Aids: Conventional versus Alternative
- Appendix 3. Survey Statistical Results
- Appendix 4. Cross Tabulations

EXECUTIVE SUMMARY

The Regional Municipality of Ottawa-Carleton (RMOC) has identified subdivision development standards as an area for potential to encourage and produce more affordable housing. An RMOC report has been completed entitled, Alternative Development Standards: Proposals to Reduce Housing Costs. This ADS report identifies a number of planning and engineering standards which can significantly impact the built environment and housing costs.

This market study conducted by Brethour Research, was initiated by the RMOC to quantify potential market acceptance and demand for ADS, to determine market expectations for housing designs and features, and to determine general market expectations and concerns relating to the neighbourhood and community context.

The main research components of this study include a consumer opinion survey and focus groups, both of which evolved from a home buyer seminar. The study also reviewed the Ottawa-Carleton housing market and several projects in both Ottawa and Toronto targeted to "affordable" market niches.

Highlights of the study are summarized below:

1. The Ottawa-Carleton housing market (new and resale) has been in slow decline from 13,470 units sold in 1988 to 10,477 units sold in 1991.
2. A substantial number of these homes have been sold at prices below \$160,000 indicating a strong market for entry level and first-time move up buyers. There are also empty nester or move down buyers active in this market.

3. There are a number of new projects in both Ottawa-Carleton and in the greater Toronto area that have produced innovative product usually on smaller lots with smaller homes at lower price points. Many of these projects have produced excellent sale results.
4. The current and short term economic trends indicate a continuing need for more affordable housing especially for first-time buyers and move down or empty nester buyers. Current and short term interest rate expectations will also encourage many first-time buyers to enter into the home ownership market.
5. The Home Buyers Seminar attracted some 170 people and produced 153 valid consumer opinion surveys. In addition some 29 attendees at the seminar participated in 3 focus group sessions. The survey respondents represented an excellent cross section of potential home buyers in terms of age, current housing situation, income, family size and intentions to purchase. The results apply to Ottawa-Carleton residents interested in purchasing a more affordable home.
6. The ADS components surveyed in this study include lot width, lot depth, front and rear yard setbacks, door to door separations and right of way widths. The anticipated dollar value savings of these components was estimated at \$12,500 for Singles and \$5500 for Townhomes.
7. Fifty-four percent of respondents expect to purchase a Single family home and 32% expect to purchase a Townhome. The majority of respondents (62%) expect to purchase a home between 1000 and 1800 square feet.

8. Most respondents indicate a preference for 3 bedroom homes however, a surprising number indicate a preference for 2 bedrooms - 21% of the single home and 37% of the Townhome purchasers. There is also significant interest in a "grow home".
9. The financial expectations and abilities of the survey group are consistent with current market conditions. A price point of \$120,000 with current interest rates and typical down payments would satisfy most respondents' expectations.
10. Of those respondents interested in Singles, 68% said they were likely or extremely likely to purchase an ADS Single. For those interested in a Townhome, 71% indicated an intent to purchase an ADS Townhome.
11. The survey analysis confirms that Consumers interested in the savings to be achieved by implementing one of the ADS components - e.g. - lot width - are also interested in the savings to be achieved by incorporating all ADS components (the total package).
12. There is a preference to purchase a home inside the greenbelt although this is coupled with a recognition that land costs may force an ADS project to be located outside the greenbelt. Assuming an acceptable price and house design, a location outside the greenbelt is acceptable.
13. There is a definite interest in including various neighbourhood facilities i.e. convenience store, recreation centre, park walkway systems etc., in an ADS project within walking distance but in a more residential like form and environment to create a greater sense of neighbourhood.

14. The survey group was supportive of issues relating to the mix of product type, intensification, and in-home occupations.
15. Any ADS project must pay special attention to open space design to provide for a walkway/bikeway link system to small nodes of open space for tot lot and play facilities.
16. The environmental benefits of ADS relating to land conservation and reduced consumption of construction materials are deemed positive by the survey group.
17. House designs in an ADS project should be fairly conventional however, there is potential to sacrifice room sizes and components ie: ensuite master bathroom to achieve an affordable price point.
18. There is definite market potential for an ADS project in Ottawa-Carleton. Strong market niches include the entry level group and empty nesters. There is also potential demand from the general market looking for more affordable housing.
19. The critical requirement for the success of an ADS project is price. With a reduced price compared to conventional housing it will be in demand. However, other important elements include: sense of community, pride and security of ownership, location and neighbourhood facilities.

1.0 INTRODUCTION

1.1 BACKGROUND

There is currently a tremendous interest within the realm of urban planning in pursuing innovative housing forms and affordable housing. The market conditions of the late 1980's spawned a period of rapid growth and home construction in the urbanized areas of Ontario and North America. Unfortunately, the supply of housing opportunities was often outstripped by demand, and home prices soared. In many urban areas, household incomes did not rise accordingly, and housing quickly became out of the reach of many.

In Ontario in 1989, this affordability problem was addressed through new Provincial policy, and affordable housing was given a new priority in planning. In Ottawa-Carleton, this issue was examined through the completion of a new Regional Housing Statement. Recommendations were then expressed in the Regional Official Plan, namely through ROPA #27. One of the emphases of this new planning policy was for local municipalities to provide more affordable housing.

There are many ways to provide for affordable housing. Unfortunately, many of the more direct avenues are outside of the domain of urban planning. For example, development charges, taxes, and construction costs cannot be affected by land use decisions. However, planning for more efficient housing forms such as are possible through innovative planning and engineering standards appears as a laudable objective.

As part of its role in encouraging affordable housing in this Region, the Planning Department of the Regional Municipality of Ottawa-Carleton (RMOC) has identified subdivision development standards as an area worthy of study. Hence, a Regional Working Committee on **Alternative Development Standards** was formed in 1990/91 to examine this topic in detail. This committee was chaired by the RMOC Planning

Department, with representatives from local municipalities, utility companies, and the building and development industry.

The product of this committee was a report entitled, Alternative Development Standards: Proposals to Reduce Housing Costs. This document was endorsed by Regional Council in August, 1992. It has been given widespread circulation, and the recommendations in principle have been accepted by many affected parties, including the Ottawa-Carleton Home Builders' Association, and the Ministry of Housing.

The aforementioned report has introduced a number of non-conventional planning and engineering standards for new residential developments. Many of these standards will result in new neighbourhoods which have a different "look" and "feel" than conventional developments. Initiatives which impact the built environment include:

1. Local streets with Right-of-Way (ROW) widths of 16m where appropriate,
2. Front yard setbacks reduced to 3.0m,
3. Door-to-door home separation reduced to 22m,
4. More on-street parking,
5. Single detached lots measuring 7.9m (26ft) by 23m (75ft),
6. Freehold townhome lots measuring 5.5m (18ft) by 23m (75ft), and
7. Elimination of street curbs.

Following from this excellent planning initiative, the RMOC has decided to promote Alternative Development Standards in Ottawa-Carleton. To this end, the RMOC hosted a Design Charette in February 1991 to solicit creative house designs and neighbourhood plans. The RMOC has also participated in numerous sessions and seminars to generate greater understanding and support of Alternative Development Standards.

Furthermore, the RMOC has been attempting to facilitate the construction of a

demonstration project in Ottawa-Carleton. Through discussions with area municipalities, and local builders it has become apparent that there is a need to complete a market analysis study to evaluate consumer demand and product preferences, as well as the overall marketability of residential developments based on Alternative Development Standards (ADS).

1.2 OBJECTIVE OF STUDY

There are a number of objectives to be achieved in completing this market study. The primary objective is to quantify potential market acceptance of the various ADS components, i.e. right-of-way, lot size, setbacks, densities, etc., for both Single Family homes and Townhomes. Furthermore, the marketability of the total package, incorporating all ADS components with the corresponding cost savings, is assessed.

A second objective is to determine consumer expectations in terms of housing product in an ADS development. This will examine house size and other design components.

A third objective is to determine the market's expectations and concerns related to an ADS development in a neighbourhood and community context. This will examine opinions on housing forms, land uses, open space, neighbourhood and community infrastructure, parking, etc.

2.0 STUDY METHODOLOGY

2.1 STUDY CHALLENGE

The challenge of this Market Study is to test a product that has not yet been manufactured and to obtain consumer opinion on a series of complex components that can only be illustrated at this time. While this test is limited to an evaluation of a concept, it is supported with empirical evidence intended to pass the scrutiny of concerned professionals.

2.2 HOME SALES OVERVIEW

This component of the study methodology includes a review of both new and resale homes sales over the past five years in Ottawa-Carleton. The review focuses on product between \$100,000 and \$160,000 to illustrate market demand and consumption of product that is considered comparable to potential ADS product from a price perspective.

Data sources for this review include the **Brethour Research Associates Limited New Home Sales Report** and the Canadian Real Estate Association.

This Home Sales Overview focuses on market activity over the last 18 to 24 months, a period within which the local housing market has been impacted by a recession and subsequent recovery. This pays particular attention to specific buyer groups and unique market trends.

2.3 COMPARATIVE SITE SALES REVIEW

In the recent past, there has been several new home sites in Ottawa-Carleton which have

been targeted to first time buyers and/or or move down buyers. Specific examples are reviewed to illustrate sales history and buyer profiles towards an understanding of these housing initiatives. These will not necessarily be sites which were met with great success in the marketplace, but rather, be a sampling of significant sites which broke from the conventions of the day.

Sites in other cities in Ontario, particularly in the Toronto area, have also been selected for similar analysis.

2.4 BUILDER OPINION SURVEY

The final component of the Study Methodology is a Builder Opinion Survey. A total of ten individuals active in the Ottawa-Carleton housing industry were contacted and interviewed. The interviews focused on their thoughts and concerns regarding ADS. All were questioned regarding issues they would like to see addressed in a market study and specifically in a Consumer Opinion Survey.

The individuals selected involved a cross section of local builders. They include "small" builders, larger builders, and land developers. Some builders drew from primarily local experiences, while others brought a more provincial or national perspective.

2.5 CONSUMER OPINION SURVEYS

A vital component of this study methodology is an analysis of consumer opinion. Consumer response to the concept of ADS and the implications relating to affordability, new housing alternatives, as well as neighbourhood and community design are critical to the success of this study. It was determined that the most effective way to obtain consumer responses was to conduct a home buyer survey and a series of focus groups.

A comprehensive consumer opinion survey questionnaire (see survey instrument at Appendix "A") was prepared for completion at the seminar and was used as a basis for discussions at the focus groups.

2.5.1 Buyer Seminar Survey

A buyer seminar was organized and held on July 15, 1992, at the Nepean Civic Square Council Chambers. The event was promoted through newspaper advertising and editorial, as well as radio advertising over a 3 week period prior to July 15, 1992. A copy of the advertisement as published in the Ottawa Citizen is included on the following page.

Approximately 170 people attended the event. The seminar was divided into two basic components. The first component consisted of the presentation and completion of a consumer opinion questionnaire. Overhead illustrations were used to graphically represent ADS in comparison with conventional standards.

The second component of the seminar consisted of presentations by a panel on topics including banking/financing, legal issues, housing market trends and ADS. This component also included a question and answer period.

It is important to note that the buyer survey was conducted prior to any description or promotion of either the general concept and merits of ADS or any of the specific initiatives. Most respondents completed the survey without any previous knowledge of ADS, and there was no attempt to influence their perceptions prior to the survey. Furthermore, during the implementation of the buyer survey, the survey conductor offered no editorial on any aspects of ADS, and kept the narrative to technical points only. In this manner, the survey team introduced no bias to the survey participants and maintained a valid survey response.

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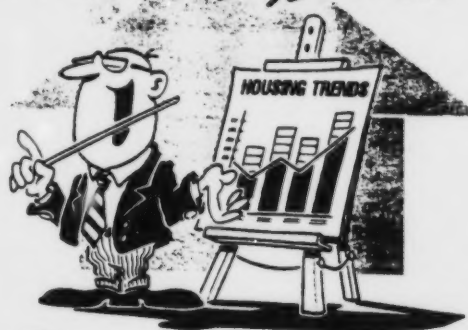
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2.5.2 Focus Groups

The Consumer Opinion Survey provided those present with an opportunity to express their interest in participating in discussion groups to be held the following week. In excess of 80 individuals indicated such an interest. This in itself is a positive indication of people's interest in ADS.

A total of 29 people attended 3 separate focus groups also held at Nepean City Hall from July 21 through to July 23, 1992. These focus groups discussed issues covering house design, product and community considerations, and ADS in more detail. Each session lasted approximately 1 1/2 to 2 hours and permitted the survey team to gain more articulate and personal response to items not easily examined in the buyer survey.



3.0 SMALL HOUSING SALES REVIEW

3.1 Historical Market Review

New home Sales in Ottawa-Carleton have been in a slow but steady decline since 1988. That year sales totalled some 4069 units. By 1991 sales had dropped to 2079 units. The first 6 months have seen an improvement in the new home market with 1671 sales. With reasonable activity over the remaining 5 months total sales should rebound in 1992 to some 2500 units.

The resale market in Ottawa-Carleton has remained healthy over the last 5 year period. Sales activity in 1988 peaked at 9401 units and declined to 8249 units 1990. To the end of June 1992 the resale market has produced just over 5000 sales and should end the year at around 8500 sales.

Details on annual sales activity for both markets is provided at Table 1.

TABLE 1
OTTAWA-CARLETON HOUSING MARKET

YEAR	NEW HOME SALES	RESALES	TOTAL SALES
1988	4069	9401	13,470
1989	3533	9399	12,932
1990	2711	8249	10,960
1991	2079	8398	10,477
*1992	1671	5082	6,753

* Sales data is to June 30, 1992.

Source: Canadian Real Estate Association (Resales)
Brethour Research Associates Limited (New Home Sales)

The resale market has produced a substantial number of sales at price points below \$160,000. The inventory of product by various types below \$160,000 is substantial in the resale market. Therefore many entry level buyers are able to satisfy their housing requirements in this marketplace.

On average over the last five years in the resale market in excess of 55% of total sales in Ottawa-Carleton have been at prices of \$160,000 or lower. The \$160,000 price benchmark is selected because of its proximity to the affordable house price defined by the RMOC for 1992. Also, the resale data is broken down by price cohorts that in one cohort stop at \$159,999.00. These figures are detailed at Table 2.

TABLE 2
OTTAWA-CARLETON MLS RESALES

YEAR	SALES BELOW \$160,000	TOTAL SALES	% OF TOTAL SALES
1988	5,539	9,401	59%
1989	5,093	9,399	54%
1990	3,902	8,249	47%
1991	4,813	8,398	57%
1992*	3,200	5,082	63%
TOTALS	22,547	40,529	55.6%

* Note: 1992 data is to June 30, 1992

SOURCE: Canadian Real Estate Association

It is very difficult to track new homes sales by price point as each sale is the subject of negotiation between Vendor and Purchaser and there is no central registry system similar to the Multiple Listing Service of the local real estate board. Canada Mortgage and Housing Corporation has only recently begun to track new home sales by price but their data base covers only single family homes. As has already been indicated, the bulk of the new home market activity at lower price points occurs in either the on-street townhome or condominium product types.

However, the CMHC data for the Ottawa-Carleton Census Metropolitan Area indicates that over the last 30 months, new home completions under \$160,000 have been 27.7% of total completions. This data is detailed at Table 3.

TABLE 3
New Home Completions Under \$160,000
Ottawa-Carleton CMA

YEAR/ QUARTER	COMPLETIONS UNDER \$160,000	TOTAL COMPLETIONS	% RELATIONSHIP
1990 1st	160	550	29.1%
2nd	191	666	28.7%
3rd	254	950	26.7%
4th	189	747	25.3%
1991 1st	126	445	28.3%
2nd	78	213	36.6%
3rd	178	604	29.5%
4th	159	632	25.2%
1992 1st	122	491	24.8%
2nd	111	364	30.5%
TOTALS	1,568	5,662	27.7%

SOURCE: Canada Mortgage and Housing Corporation

Over that same time period, multiple family new homes sales captured 51.5% of total new home sales within the Ottawa-Carleton new home market area. This is the urban market area of the Region and is slightly smaller than the Ottawa C.M.A. It is reasonable to assume that almost all sales to perhaps 90 - 95% of the total multiple family sales are below \$160,000. This sales data is detailed at Table 4.

It is clear that the bulk of home sales taking place in Ottawa-Carleton are at prices below \$160,000.00. At this price point, the entry level buyer and first time move-up buyer are

active participants in the marketplace. There are also move-down buyers satisfying their housing needs below this \$160,000 price point.

TABLE 4
Multiple Family New Home Sales
Ottawa-Carleton Market Area

YEAR	PRODUCT				TOTAL SALES	% RELATIONSHIP
	ON-STREET TOWNS	CONDO TOWNS	CONDO APTS.	TOTAL MULTIPLE		
1990	614	308	399	1321	2711	48.7%
1991	504	318	227	1049	2079	50.5%
1992*	591	165	104	860	1671	51.5%

*NOTE: 1992 data to June 30, 1992.

SOURCE: Brethour Research Associates Limited

3.2 REVIEW OF SELECTED SITES

The Ottawa-Carleton new home market is arguably conservative in nature. Most builders focus on conventional housing product which is designed to satisfy the broadest possible market. In tougher market environments, however, attention begins to focus on affordability, design and specifications. Over the last 18 to 24 months builders have reacted to the strength of the entry level market by producing very affordable on-street townhomes and small single family homes.

Appendix 1 to this report provides data sheets on twelve significant new home projects in Ottawa-Carleton and the Greater Toronto Area. Each of these sites have delivered affordable housing, some of them have done so using innovative housing forms. It is important to understand the sales success of this sampling of projects because it can provide important lessons on consumer behavior towards non-conventional housing projects.

Admittedly, in Ottawa-Carleton there has been very little innovation in terms of new housing forms. Only one of the six local sites profiled, Club Citadelle by Timberlay Homes, has introduced a new and novel type of affordable housing. It was condominium in tenure, with a "club" attraction and with on-site recreation and amenities. It enjoyed great sales success, selling at a rate of 7.9 units per month during the period 1985 through 1987. Three to four sales per month per site in Ottawa-Carleton is a reasonable benchmark for comparison. At this time, units were offered at prices as low as \$60,000.

Another condominium site profiled, Hunt Club Court, also has enjoyed a moderate success rate as an entry-level project. Stacked townhomes in this project remain available in 1992 at just under \$110,000. This site has generated 4.7 sales per month over time. While definitely providing affordable housing, this site cannot be labelled as innovative. In fact, the general format is identical to hundreds of other stacked townhome units constructed in the 1980's across Ottawa-Carleton.

One site, being Thorncliffe Village in the City of Ottawa, has shown housing innovation, and has also demonstrated acceptable sales performance. This project has experimented with two relative unknowns and has started off on a positive note, registering 4 sales per month since its opening in January 1992. This is important because the two unknowns were quite significant. The first was the market acceptance of very narrow (13 feet and 14.7 feet wide) townhomes, and the second was the marketability of ownership housing in an assisted housing environment.

There have been some notable affordable housing projects developed in the Toronto Area in the last few years. Two of these which have received some province-wide recognition have been developed by Greenpark Homes. The first was labelled "Interlot" and produced 44 single detached homes in 1990 at under \$180,000. This was definitely good home value in Brampton at that time. It was based on a creative "zippered" lotting

arrangement which provided a unique rear yard area, at a gross density of 13.3 units per acre, on 33 ft. wide lots. This project sold out in four months, with a rate of eleven sales per month.

The other Greenpark project was called Uni Quattro, which was merely a freehold townhome project with a twist, whereby units were attached principally at the garage. This project sold in the \$150,000 range in Brampton at a rate of 4 units per month.

One site in Mississauga, "Sandalwood", has recently offered product as low as \$89,999, and as small as 545 sq.ft. per unit. This is a condominium project of garden homes, with a terrific design flair, and has attracted 12 sales per month since 1990.

In conclusion, this review of selected affordable housing sites indicates that when unique housing product is offered to the marketplace, it can be quite successful. However, this is entirely tied to the relative affordability of the homes. Experience in both Ottawa and Toronto demonstrates that buyers don't buy alternative housing because it is different, but they do because it is affordable.

3.3 NEW vs RESALE

The relationship between the new and the resale home market has varied over time as a result of various economic and market conditions. In 1988 the resale market produced 2.3 sales for every new home sale. By 1991 that ratio had increased to 4.0 to 1. For the first six months of 1992 the traditional balance between both markets is beginning to establish itself with a ratio of 3.0 to 1 between resale and new home sales.

Traditionally, the resale market functions better than the new home market during economic downturns. During these times, the upper end price range in both markets become significantly less active. However, the resale market benefits from a substantial

pool of listings at the bottom end of the price spectrum. This end of the market tends to remain active during economic downturns as entry level buyers take advantage of exceptional real estate values. The new home market cannot provide product at the bottom end of the price range to compete with the resale market, at least not unless land prices drop significantly.

This was the case in 1991 when the ratio of sales between the two markets was so high. The 1991 economic condition was compounded by the advent of the Goods and Services Tax (GST). The GST was and remains payable on new homes, however in almost all cases, resale homes are exempt from this tax. Prospective purchasers perceived a significant cost difference between the two markets which influenced their move to the resale market.

Furthermore, municipal development charges (lot levies) increased significantly in 1991, and put the cost of new housing further out of reach of any prospective home purchasers.

As previously stated, the entry level buyer has substantially more choice at the lower end of the price spectrum in the resale market as compared to the new home market. At any point in time, there are in excess of 1000 listings on the Ottawa-Carleton Multiple Listing Service at asking prices below \$120,000. These listings include freehold and condominium product.

By comparison in July 1992 the urban Ottawa-Carleton new housing market had only 6 projects with product under \$120,000 - most of them either condominium townhomes or apartments. Only 2 projects offered freehold townhomes under \$120,000.

Between \$120,000 and \$160,000 the new home market begins to offer more product for the consumer. While the resale market again would usually have approximately 1000 listings in this price range at any time, the new home market has 50 projects offering

product from at least \$120,000 to \$160,000. This constitutes a virtually unlimited supply of new homes, in all urban communities. Hence, the consumer has a much broader choice of product between \$120,000 and \$160,000 both in terms of house type and location.

3.4 CURRENT TRENDS, BUYER PROFILES AND MARKET NICHES

Both New and Resale housing sales have been declining in Ottawa-Carleton since 1988. This trend has been consistent in most cities across Canada and is a result of demographics and economics. The economic growth of the 1980's provided the majority of baby-boomers the opportunity to buy a house. With the economy's slow growth in 1990 and the recession that began in 1991, the resultant impact is that housing values have ceased to increase at normal levels and in some cases have been declining. Thus those who currently own a home have a disincentive to selling it and reducing resale value potential. This coupled with general economic and employment opportunity has meant reduced "move-up" home buying activity.

So far, in the 1990's, the bulk of home sales has been provided by individuals who are motivated by need or by opportunity. With high unemployment and slow economic growth forecast over the next three years, this trend is expected to continue.

The need to change one's housing situation is typically coincident with a change in family status. There are buyer profiles which each relate to a change in family status and the need to change the housing situation. Marriage and/or the birth of a child are frequent motivators for couples to buy their first home or a somewhat larger home. These are entry-level buyers. When children leave home, the couple are often referred to as "empty-nesters" and this change usually motivates a desire for a smaller, more easily maintained house. These are "move-down" buyers. A third group of potential buyers is made up of those who have lost a partner (separation/death) or those who have

acquired financial stability with no partner. These are "single" buyers. Typically, they are interested in smaller, less expensive homes.

Each of these buyer groups represents a viable market niche in today's housing market and into the short term future. Builders that are able to best appeal to buyers in one of these family transition stages will reap the rewards in housing sales. Entry-level buyers represent a unique niche however, because their need is coupled with increased opportunity. With downward pressure on house prices - because of the slow economy - extremely low interest rates and the ability to pay just 5% of the mortgage as a down payment (with or without RRSP.s), there is a real opportunity for more entry-level buyers to be able to afford a home purchase that meets their requirements.

3.5 MARKET DEPTH AND AFFORDABILITY FACTORS

There are two significant market niches that will have interest in purchasing homes in an ADS project. These market niches have already been described earlier in this report. The entry-level or first time buyer has been driving both the new home and the resale housing market in Ottawa-Carleton since the Spring of 1991. This group has probably absorbed at least 50% of all homes sold over the last 16 months. However, the pool of buyers in this group is still very large and has potential to continue to purchase homes for some time to come. Recent economic trends have combined to in fact increase the market depth for this particular buyer. Substantial reductions in interest rates over the last 12 months combined with stable house prices and modest income increases have made housing more affordable for many people in Ottawa-Carleton.

Canada Mortgage and Housing Corporation publishes an Affordability Indicator semi-annually. This Affordability Indicator is a general definition of current renters who can afford to purchase a certain home based on specific criteria. The June 1992 Affordability Indicator showed that 40.2% of family renters in the Ottawa CMA could afford to

purchase a home. This was an increase of one percent over the December 1991 indicator. The corresponding figures for non-family renters were 23% in June 1992, up from 22.3% in December 1991.

Clearly current and short term economic conditions insure that the market depth for entry-level buyers is substantial. The potential for ADS to reduce housing costs will in fact increase the already substantial market depth for entry-level buyers. This is because CMHC has utilized an "Average Starter Home Price" of \$124,030 in 1992, and it is anticipated that ADS can produce new housing below this price.

The second potential market niche for ADS housing is the cash-out, move-down retirement market. This market niche has been tapped for several years in the Greater Toronto Area market. It is a broad and growing market that has potential for a variety of housing product at a full range of prices. The Ottawa-Carleton housing market has generated only a few projects specifically targeted to this market. These existing projects were targeted to an upper end market and were quite successful.

Some purchasers in this market group have been satisfying their housing requirements through the purchases of conventional product across the Region. Most new home builders offer bungalows and smaller single family homes which generate some sales to this move-down market. Several Freehold Townhome projects throughout the Region report sales to empty-nesters or retirement people, and many such projects also offer bungalow models. Moving through the decade of the 1990's and past the year 2000 this market group will continue to grow as the baby boom generation reaches middle age and retirement. The range of product required to satisfy their housing needs is expected to augment accordingly.

Smaller communities outside the Ottawa-Carleton Region are reportedly experiencing some in migration of retired people looking for less expensive housing.

Historical market trends in the United States and the Greater Toronto Area confirm that this market group has a number of specific objectives in terms of housing. These include:

- purchase of housing that is significantly less expensive than the housing currently occupied
- interest in a community environment with the supporting community infrastructure, i.e. shopping, hospitals, churches, recreation, etc.
- flexibility of housing styles, i.e. single family, condominium, townhome or apartment

ADS has the capacity to satisfy all of these objectives for this particular market group. An ADS community or project has the potential to produce housing that is significantly less expensive than most housing currently occupied by this group. As well, an ADS project can be located on a vacant parcel in an existing community with close proximity to established community infrastructure.

Finally, an ADS project has the potential to produce a variety of housing choices from freehold to condominium and from ground oriented to apartment.

The most attractive opportunity for this market group may be in the single family product of an ADS project. Smaller bungalows and split level homes on smaller single family lots will generate substantial interest in from the cash-out move-down market. The lower price range of this market group has yet to be addressed in the Ottawa-Carleton housing market. An ADS project focused to this market group has excellent potential.

4.0 ANALYSIS OF CONSUMER OPINION

There were two vehicles used to assess consumer opinion on Alternative Development Standards: a survey questionnaire, and focus groups. The questionnaire provided the core content for evaluating the acceptance of and demand for ADS housing. The focus groups provided more detailed information and personal input on a variety of topics that the questionnaire could not elucidate. The information gathered from each vehicle is assimilated into the final analysis.

This section of the study presents the results of the questionnaire and focus group surveys. As guideline, the sub-sections will outline the following:

- 4.1 The representativeness of the survey results;
- 4.2 Characteristics of the survey respondents;
- 4.3 Characteristics of the home that respondents expect to purchase;
- 4.4 Opinions on ADS; and
- 4.5 Community and housing design concerns.

Following this detailed analysis, a summary of consumer opinion will be presented in Section 5.1 of the conclusions to this study.

4.1 SURVEY VEHICLES - RESPONSE AND SIGNIFICANCE

This section details the survey vehicles. A brief description of the survey methodology is reviewed, focussing on the questionnaire response rate, the significance of the information as it applies to Ottawa-Carleton residents, and the focus groups.

4.1.1 Questionnaire Response Rates

The Home Buyer's Forum attracted approximately 170 people, each of whom was asked to complete a survey questionnaire (See Appendix 2). Some attenders did not answer the questionnaire and 8 questionnaires were not properly completed and considered invalid. In total, 153 valid questionnaires were completed. Brethour Research anticipated that a minimum of 100 questionnaires were needed to enable appropriate analysis. Thus, both Brethour Research and the R.M.O.C. were pleased with the sample size.

4.1.2 Significance of the Sample

The Home Buyer's Forum did not provide a random sample of Ottawa-Carleton residents. This was intentional. Inherent in the promotional material and the event itself, was a bias towards those interested in purchasing a home - specifically homes "built for today, but with yesterday's sense of community... and yesterday's price tag." Clearly, the Buyer's Forum was not for everyone, thus the survey results should not be generalized to the Region's population. Thus the 153 questionnaire respondents are not representative of all Ottawa-Carleton residents, but rather, are representative of a potential target market for ADS product.

Prior to organizing the Home Buyer's Forum, Brethour Research recognized that the opinions of those who do intend to purchase a home represented the target group to reach. With this criteria, the views of residents who have no intention of buying an ADS house were screened out. As a further refinement, the Home Buyer's Forum was promoted to attract buyers looking for (more) affordable housing. Thus Brethour Research wanted to survey:

- potential home buyers; and
- buyers looking for (more) affordable housing;

It is this group to which the questionnaire can be generalized. The 153 questionnaire respondents are representative of potential home-buyers interested in more affordably priced housing. Statistically speaking, the results will be accurate within 8 percentage points, 19 times out of 20. By contrast, to achieve accuracy within 1 percentage point would have required almost 10,000 questionnaire responses. Thus, given the size of the sample, Brethour Research is very satisfied with the accuracy of the results.

4.1.3 Focus Groups

The survey questionnaire included an invitation to participate in discussion groups at a later date. Over 80 of the 153 respondents said they were or might be interested in attending the groups. From these 80+ respondents people were called randomly and 3 focus groups were organized for the evenings of July 21, 22, and 23. There were 10, 10 and 9 respondents in attendance for a total of 29.

Those that attended the focus group sessions were a cross-section of the respondents. They included first-time buyers, entry level buyers, some third and fourth time buyers and some move-down buyers. Focus group attenders are considered as being representative of the questionnaire respondents.

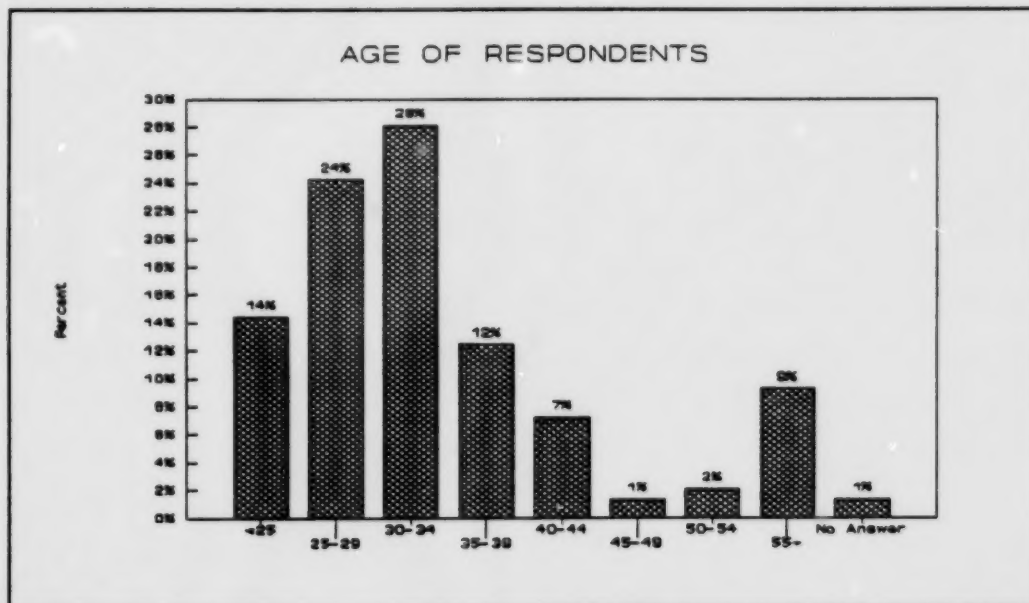
4.2 THE SAMPLE GROUP

This section analyses various demographic characteristics of the questionnaire respondents. As well, consideration is given to the current housing situation of the respondents. Appendix 4 provides questionnaire response summaries.

4.2.1 Demographic Profiles

A graphic representation of age appears in Figure 1. Two thirds of respondents were under 35 years of age, reflecting the current market activity of entry-level buyers. Fifty-two percent of respondents were between 25 and 34. Respondents between 35 and 44 represented 18%, while just 3% were between 45 and 54. Move-down buyers are typically over 55 years of age and this accounted for 9% of respondents. These age breakdowns are reflective of the anticipated profiles of ADS home buyers.

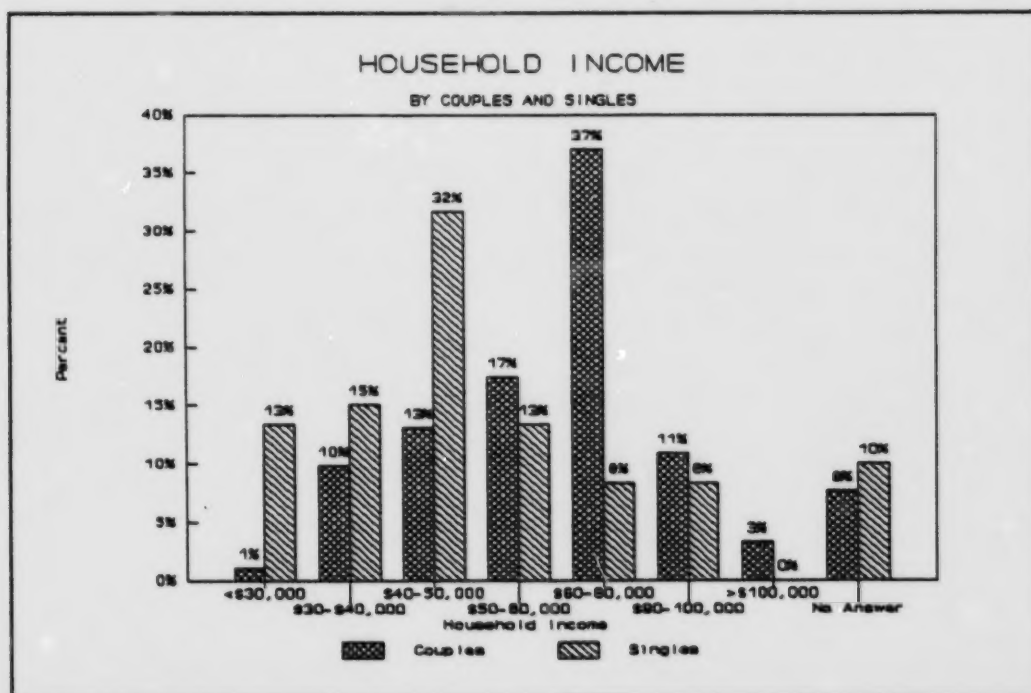
FIGURE 1



Sixty percent of respondents described their family status as being part of a couple. Specifically, 23% of respondents were in a couple with children, 37% without children. Three percent of respondents were single parents, 7% were separated, divorced or widowed and the remaining 30% described themselves as single. Most respondents did not have any children (74%), 12% had 1 child, 10% had 2 children and 4% had 3 or more.

Household incomes responses tended to reflect the reality of healthy income levels in Ottawa-Carleton. They were somewhat higher than Regional averages, but this was likely skewed because the sample group consisted predominantly of those expecting to buy a home. Figure 2 provides a breakdown of household incomes by family status - that is, for those in a couple, and those who are single (whether with children or separated/divorced/widowed). Two thirds of the respondents in a couple have household incomes between \$40,000 and \$80,000. For singles, 60% of respondents earned between \$30,000 and \$60,000 a total of 73% earned less than \$60,000 per year. The income ranges were predominantly sufficient for responders to become home owners, particularly with the current low interest rates.

FIGURE 2

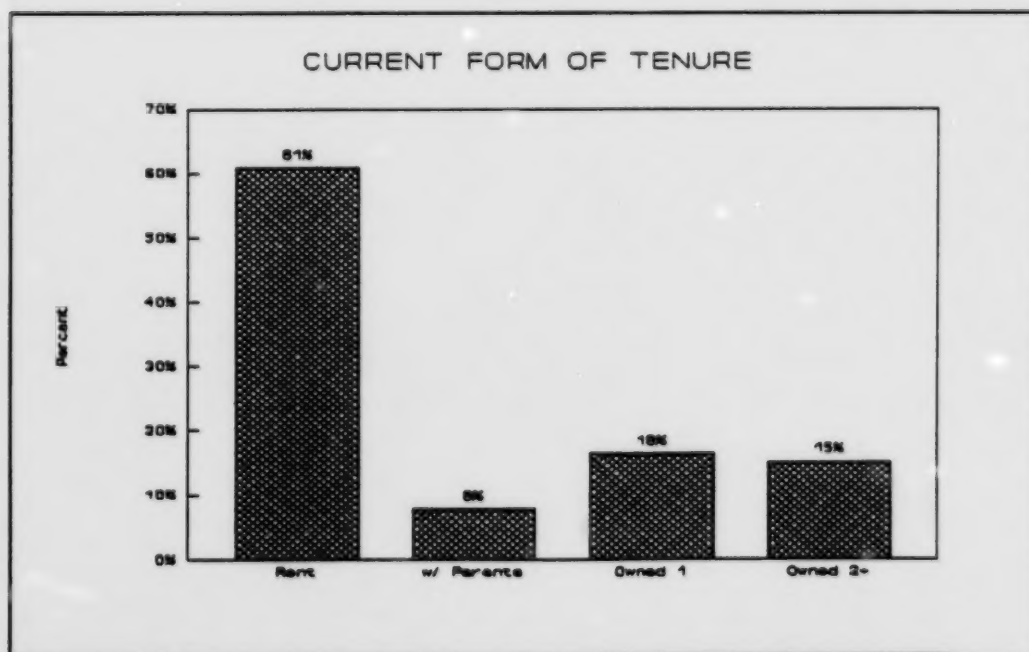


4.2.2 Current Housing Situation

Figures 3 and 4 provide a breakdown of current housing situations by tenure and by type of residence. Almost 70% of respondents could be considered entry level buyers, as 61% are currently renting and 8% live with their parents. Once again, this reflects the preponderance of first-time home buyers that are active in the current housing market. 16% of respondents live in a home that was their first home purchase, while 15% have owned 2 or more homes.

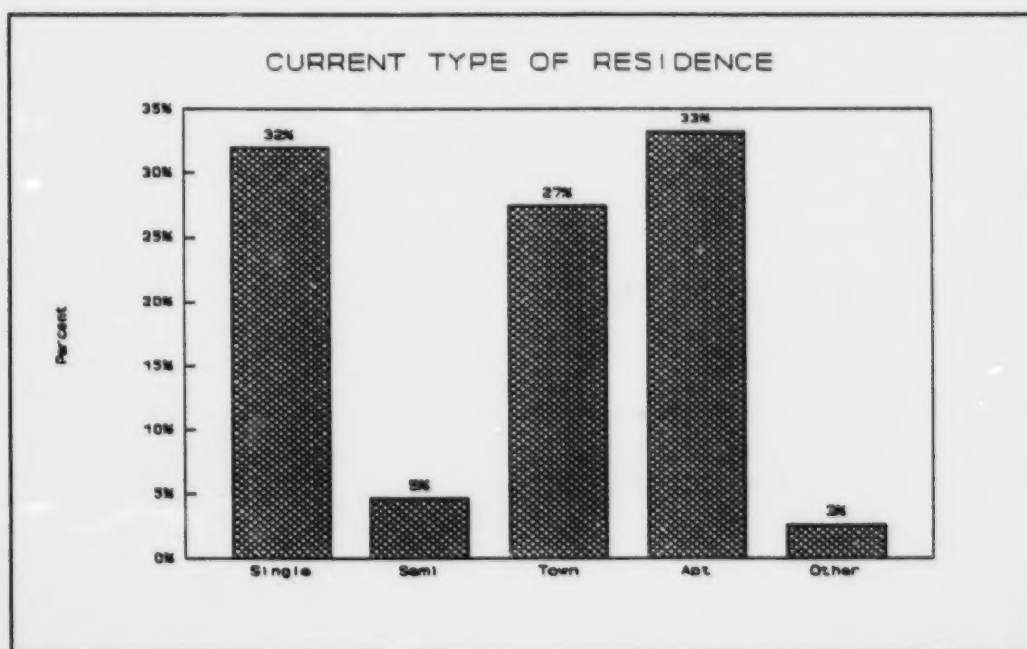
Almost all of the renters live in either a townhouse or an apartment. However, only 28% of all respondents currently live in a townhouse and 33% live in an apartment. Conversely, almost all of the home-owners live in a Single Family home. Thirty-two percent of respondents live in a single and 5% in a semi-detached house.

FIGURE 3



When asked when they expected to purchase a home, 90% said it would be within 5 years. While 8% said they were not sure, these results confirm that the Home Buyer's Forum was an effective way to screen out those who do not expect to buy a home within 5 years. Almost half of the respondents (49%) intend to purchase within 1 year, 32% intend to purchase a home within 2 or 3 years and the remaining 9% expect to buy a home within 4 or 5 years.

FIGURE 4



4.3 HOUSING EXPECTATIONS

This section of the report considers the house that respondents expect to purchase. Respondents were told not to respond according to their ideal or dream house, but rather to consider the house that they were most likely to buy. Respondents were probed as to the type and size of their expected home purchase as well as various features. These

include: the number of bedrooms and bathrooms, garages, whether they intend to finish the basement, views on a "grow" home and others. Respondents were also asked what down payment they could make, what monthly payment and what price they expect to pay for the home they expect to purchase. This information is summarized below.

4.3.1 Type of Home

Most of the questionnaire respondents expect to purchase a freehold home (86%). The majority expect to purchase a Single (54%) and another 32% expect to purchase a Freehold Townhouse. Semi-detached and Condominium Townhomes were each preferred by 5% of respondents and none of the respondents expects to purchase an Apartment. These results correspond fairly proportionately to typical new home sales patterns in Ottawa-Carleton, with the exception that Apartments usually represent 5-10% of all sales. The majority of these sales are in the City of Ottawa, in inner-city environments.

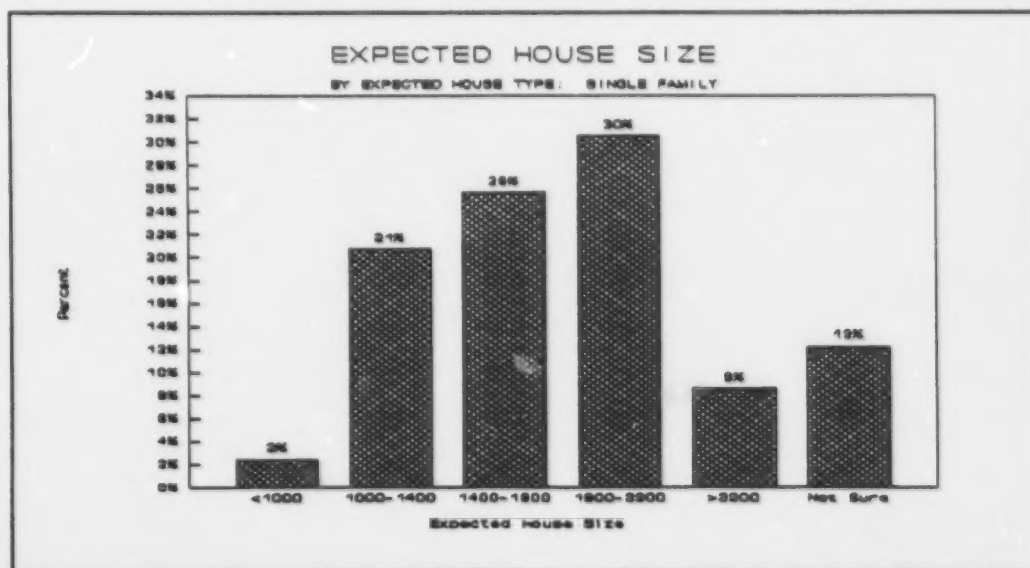
The type of home people expected to purchase varied somewhat depending on their current housing situation. Table 5 provides a breakdown of these figures. As would be expected, those who currently live in a Single Family home expect to purchase a Single (71%). Those who currently live in a Single but expect to purchase another house type include either buyers 55+ looking to move-down or those who currently live in their parent's Single. Somewhat surprising however, is that 15% of respondents currently live in an Apartment - predominantly renters - but expect to purchase a Single. In the new and resale market, Brethour Research estimates that less than 5% of first-time buyers move directly from renting an Apartment to owning a Single. Upon further examination however, most of the 15% intend to buy a home in 4 or 5 years, which helps explain this discrepancy.

In terms of tenure and expected house type, the data conforms to expectations, with one exception. Thirty-one percent of the respondents currently rent or live with their parents and expect to purchase a single. Again this figure is considerably higher than is expected in the current housing market. But once again, the data can be explained by the proportion of respondents that do not expect to purchase in the immediate future.

4.3.2 Size of Home

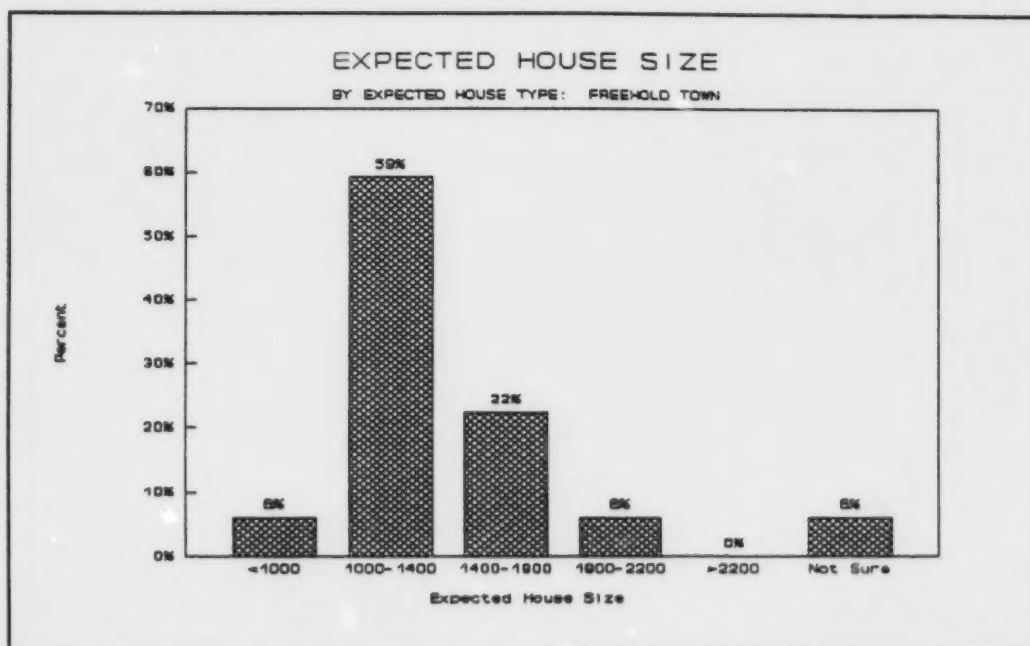
Respondents tended to expect to purchase a modest size home. Just 3% were interested in a home under 1000 square feet and 5% over 2200 square feet. There were however 10% that may have been unfamiliar with square footage sizes as they indicated they were not sure what size of home they expect to purchase otherwise, they simply were undecided. Other respondents selected 1000-1400 sq.ft. (37%), 1400-1800 sq.ft. (25%) and 1800-2200 sq.ft. (18%). Table 6 provides a breakdown of expected house size by current house type and tenure. There are a few unexpected anomalies in this comparison, but generally the data reflects reasonable aspirations.

FIGURE 5



Perhaps the most interesting comparison is that of people's expected type and size of home. Figures 5 and 6 illustrate the size of homes respondents expect to purchase for those interested in a Single or a Freehold Townhouse.

FIGURE 6



The maximum building envelope of an ADS lot is naturally smaller than that for a house on a conventional (i.e. larger) lot. Including finished basement space, it is difficult for a 2-storey ADS house to be over 1800 sq.ft. However, of those respondents who expect to purchase a Single, 39% said they expect it to be over 1800 sq.ft. ADS housing could not accommodate these buyers without going to a third storey. For the 9% that expect to buy a Single over 2200 sq.ft., it is unlikely that ADS housing could satisfy them at all without expanding lot width. However, almost 50% of respondents that expect to buy a Single expect it to be under 1800 sq.ft. and ADS housing could satisfy this group quite easily, in fact, with fairly conventional floor plans.

Respondents that expect to purchase a Freehold Townhouse generally had size expectations that ADS housing could satisfy. Only 6% expect to purchase a Townhouse over 1800 sq.ft. An ADS Townhome between 1400-1800 sq.ft. may require it to be 2 1/2 or 3 storeys. However, there are many conventional Freehold Townhouses in the marketplace with these elevations and they seem to meet with reasonable acceptance. As well, those in the focus groups who expected to buy a Freehold Townhouse expressed no concern about a 2 1/2 or 3 storey elevation. Thus the 22% of respondents that expected to purchase a Freehold Townhouse between 1400 and 1800 sq.ft. could be accommodated by ADS housing. Almost 60% of Townhome purchasers expect their home to be between 1000 and 1400 sq.ft. and this is an ideal size for an ADS format.

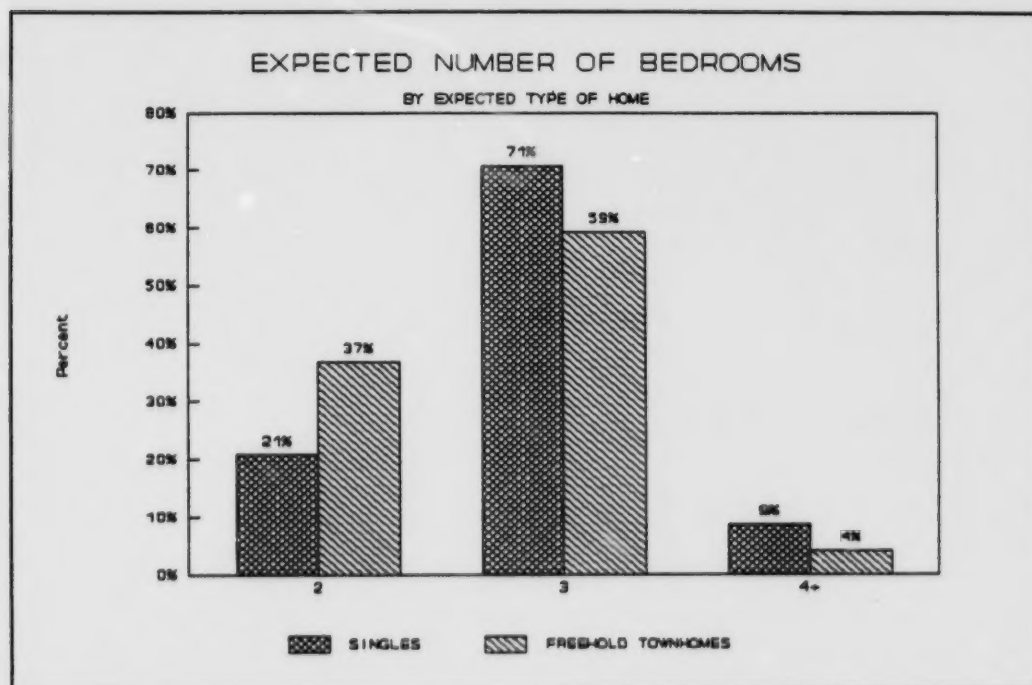
4.3.3 Bedrooms and Bathrooms

The majority of respondents (66%) expect to purchase a 3 bedroom home. ADS housing can accommodate these purchasers, but the 6% of respondents expecting a 4 bedroom would likely have to settle for the 4th bedroom on the basement level. Perhaps most surprising however is that 27% of respondents expect to purchase a 2 bedroom home. There are virtually no 2 bedroom Singles nor Townhomes in the marketplace, except for contemporary bungalows designed for move-down buyers. Figure 7 illustrates the number of bedrooms expected for Single and Freehold Townhouse buyers. Twenty-one percent of respondents who expect to purchase a Single expect to have just 2 bedrooms. Thirty-seven percent of buyers looking for a Townhouse would be interested in a 2 bedroom layout.

When these figures were compared against age, it is not surprising that those who expect 2 bedrooms tended to be predominantly under 35 or over 55 years of age. As mentioned in Section 3.4, both entry level and move-down buyers are a prime target for ADS housing. As well, despite the lack of current market supply of 2 bedroom homes, it is recognized that this is an emerging trend in housing demand. Furthermore, when

respondents were asked if they would be interested in purchasing a 2 bedroom home that could be expanded to include a third bedroom (either by a "grow" home or by finishing one in the basement), 32% said they might be and another 32% said yes.

FIGURE 7

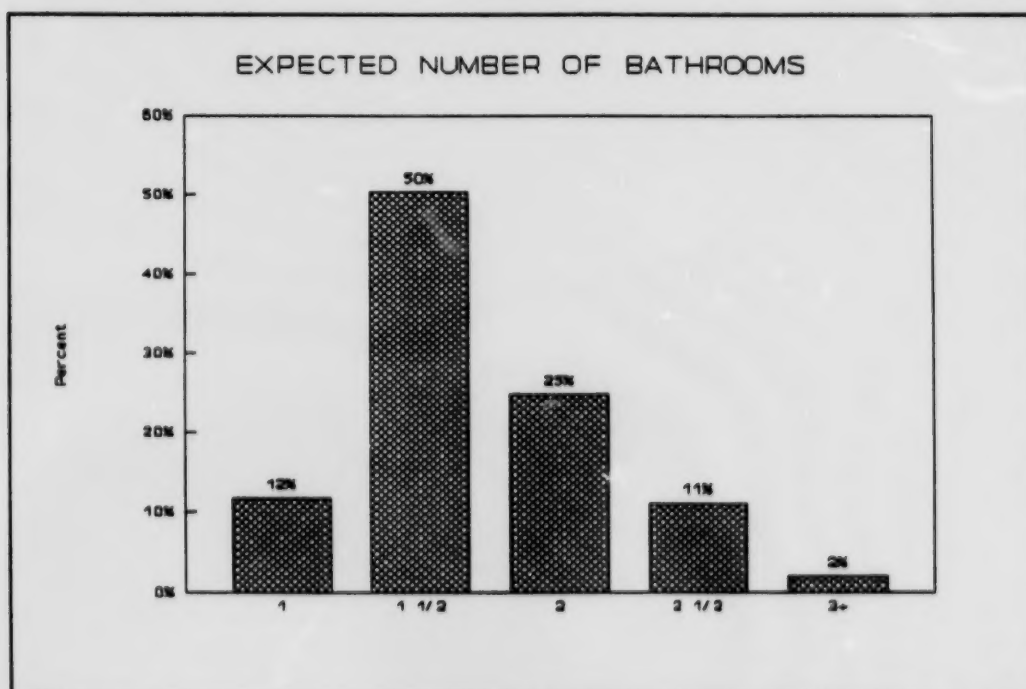


In terms of bathrooms, the new home industry has been providing 2 1/2 bathrooms (or more) in most houses over the past 5 or so years. However, only 13% of respondents said they want 2 1/2 or more bathrooms in the home they expect to purchase. Moreover, these respondents tended to be those interested in a home over 1800 sq.ft., which as mentioned previously, ADS housing could not readily satisfy. Figure 8 illustrates the number of bathrooms respondents expected to have in the home they purchase.

Of those respondents expecting to purchase a home under 1800 sq.ft., 72% said they

expect to have no more than 1 1/2 bathrooms. From this group, another 22% said they want 2 bathrooms. Through the focus groups, participants were clear that all 2-storey (or more) homes must have a ground level powder room (a 1/2 bathroom). Even participants with children indicated that they only need a 1/2 bathroom off the master bedroom, not a full bathroom.

FIGURE 8



The questionnaire and focus group results indicate that builders should carefully examine both the number of bedrooms and the number of bathrooms they offer in their homes.

4.3.4 A "Grow Home" and Other Features

A "grow home" refers to a house that can have more useable above ground living space

added to it after it is purchased. Grow homes are typically smaller and are delivered more affordably than conventional housing. When asked if they would buy a grow home, 44% of respondents said maybe and 43% said yes. Only 13% of respondents said they were not interested in a grow home. These figures suggest that builders should consider offering "grow" home plans, whether it be for conventional or ADS housing.

With such interest in a "grow" home - adding more living space - it is not surprising that 69% of respondents said they intend to finish part or all of their basement. Through the focus groups, most participants indicated they would create a family room, office or play space for children in the basement. Again, builders should be attuned to the tremendous interest in creating additional living space in the basement.

When asked how many cars there were in the household, 55% had 1 and 42% had 2 cars. Just 1% did not have a car, while 3% had 3 or more. When asked if they expect to have a garage with the home they purchase, 74% said yes - 48% said they expected to have a single and 26% said they want a double car garage. However, 26% of respondents said they would "not necessarily" have to have a garage. In the focus groups, all participants wanted at least a single car garage, but they had no problems with neighbours having carports or just driveways.

4.3.5 Location

Respondents were drawn from across the Region and beyond. 77% indicated that they currently live inside the greenbelt and 14% live beyond the greenbelt in the suburbs of Barrhaven, Orleans, Kanata or Stittsville. Three percent said they live in the rural area and 6% came from outside Ottawa-Carleton. Because the Buyer's Forum was held in the west end, there was a slightly higher number of respondents from that area; 44% live in Ottawa West, Nepean, Barrhaven, Kanata or Stittsville. Respondents indicated they would be willing to commute a median distance of 20km.

Table 7 indicates the percentage of respondents that currently live in each area and where they expect the home they purchase to be.

TABLE 7
CURRENT AND EXPECTED RESIDENCE BY AREA

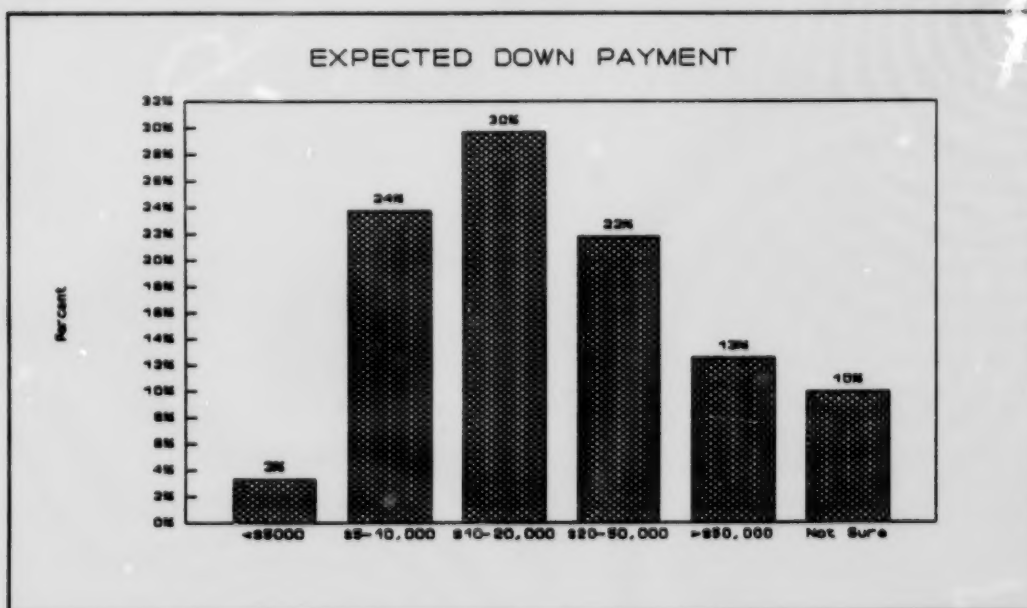
	CURRENT RESIDENCE	EXPECTED RESIDENCE
<u>Inside Greenbelt</u>		
Ottawa East/Gloucester	8.5%	14.4%
Ottawa Central	19.0%	19.6%
Ottawa South	16.3%	26.1%
Ottawa West/Nepean	33.3%	47.1%
<u>Outside Greenbelt</u>		
Orleans	3.3%	16.3%
Barrhaven	5.9%	24.8%
Kanata/Stittsville	4.6%	25.5%
Rural Area	3.3%	20.9%
Outside Ottawa-Carleton	5.9%	14.4%

The data for expected residence does not add to 100% because respondents were instructed to select "all that may apply". Because of the predominance of respondents from the west, this area received more responses. Overall, respondents confirmed the preference for expecting to purchase a home in the areas near where they currently reside. However, there is a disproportionate number of respondents that expect to live outside the greenbelt, including rural areas. Scrutiny of the responses suggests that respondents selected the area they currently live in as well as one or two of the closest outlying suburbs. For example, a typical respondent from Ottawa West/Nepean would select that area as one in which they expect to purchase a home, as well as Barrhaven and/or Kanata/Stittsville. This pattern was confirmed in the focus groups. Participants indicated that their first choice of residence was the area they currently live in, however,

if they could not afford a home in that area, they expected to move to the closest area outside the greenbelt. Focus group participants indicated that affordability was the only criteria that would motivate them to choose an area other than the one they live in.

When asked if they would prefer an ADS community to be located inside or outside the greenbelt, most said inside the greenbelt, but with the provision that it be affordable. In terms of the location of an ADS community then, the preference is for inside the greenbelt if it can be brought to the market at an affordable price. For example, possible sites might include the Clyde/Merivale lands, LeBreton Flats, CMHC National Office lands and others. However, whether inside or outside the greenbelt, an ADS community must be able to draw purchasers from the general area in which it is situated. That is, an ADS community in Kanata (for example) would appeal when it provides more affordable housing to those living in the Ottawa West/Nepean, Barrhaven, Kanata and Stittsville areas.

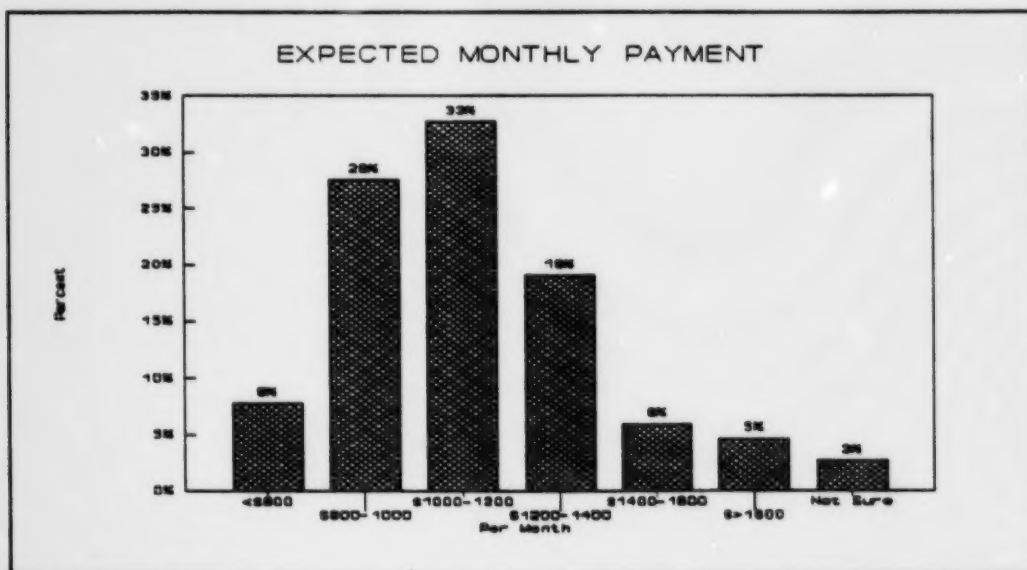
FIGURE 9



4.3.6 Financial Considerations

Respondents were asked to indicate the total down payment they expect to be able to make, the monthly payments they could afford and the maximum price they expected to pay for a home. This information is presented in Figures 9, 10 and 11. Overall, respondents had reasonable expectations in terms of the down payment and monthly payments they could afford and the maximum price they would pay for a home. All of the financial considerations correlated very strongly to household income. That is, the higher the household income, the higher the expected down payment, monthly payment and maximum house price.

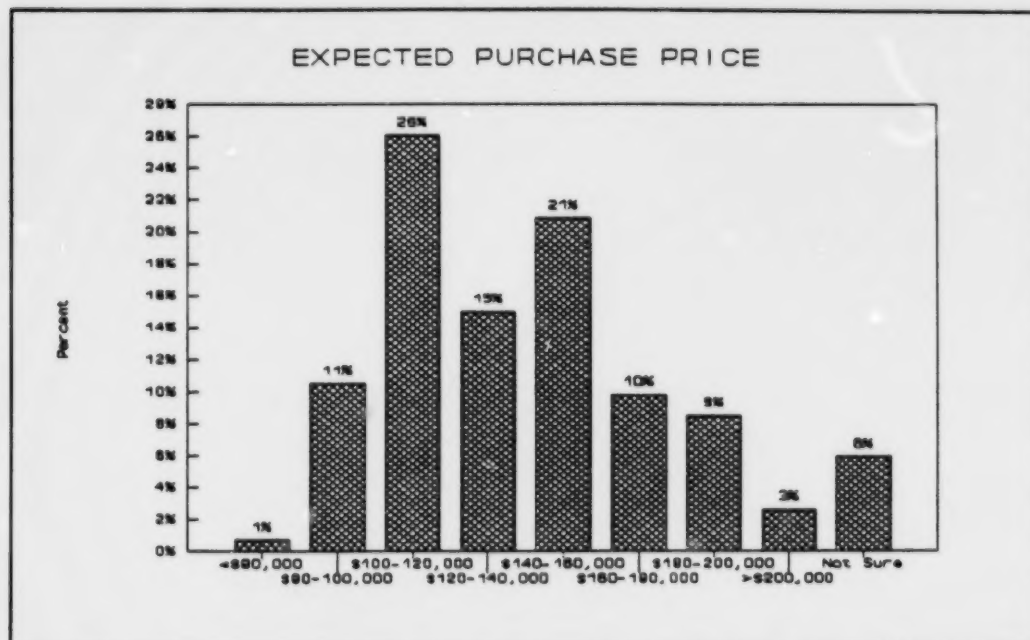
FIGURE 10



Despite the predominance of would be first-time buyers in the sample group (69%), only 3% expect to have less than \$5000 for a down payment. Twenty-four percent expected to have between \$5000 and \$10,000 and 30% expected to have \$10,000 and \$20,000 for a down payment. The 34% of respondents that expect to have over \$20,000 for a down payment were predominantly existing home owners.

These down payment expectations are in line with typical amounts in the current market place. The fact that 24% of respondents expect to place \$5000 to \$10,000 for a down payment is a reflection of the 5% down program, as well as a reality of the market.

FIGURE 11



Twenty eight percent of respondents said they could afford \$800-\$1000 as a monthly mortgage payment, which even with current low interest rates would mean a mortgage of approximately \$100,000. This is lower than the price of almost all new freehold homes in the market today. With the down payment included in the purchase price, homes that sell for less than \$120,000 would appeal to a significant portion of the market, which is not being served now. Twenty-six percent of respondents indicated they could afford a home between \$100,000 and \$120,000. Another 11% could afford a home under \$100,000. While these home prices have been difficult to achieve using

conventional standards, if ADS housing could offer freehold homes for under \$120,000, Brethour Research feels there would be significant demand for the product, whether it be inside or outside the greenbelt.

Nevertheless, most respondents expect to pay over \$120,000 for their home and to have monthly payments over \$1000. 34% of respondents indicated they could afford \$1000-\$1200 per month and 20% expect to pay between \$1200 and \$1400 per month. Similarly, 15% expect to pay between \$120,000 and \$140,000 for their home and 21% expect to pay between \$140,000 to \$160,000. The 21% that expect to pay over \$160,000 for their home tended to be existing home owners. In terms of house type, those who expected to purchase a Townhouse expect to pay less than \$140,000 and those expecting to purchase a Single expect to pay over \$120,000. This study indicates that there is a tremendous market for Singles between \$120,000 and \$140,000 - particularly for bungalow Singles.

4.4 ALTERNATIVE DEVELOPMENTS STANDARDS

Brethour Research identified a number of components of ADS and these were evaluated on an individual basis. The objective was to assess which components of ADS would be most acceptable to potential home buyers. These components include: Lot Width, Front and Back Yard Setbacks, Lot Depth, Door to Door Separation and Right-of-Way. Each of these components will be considered in section 4.4.2. The assessments of the "Total Package" of ADS is considered for both Singles and Freehold Townhomes in Section 4.4.1.

In order to provide questionnaire respondents with a realistic understanding of ADS, each question provided a description of the conventional standard and the alternative standard. Brethour Research chose a 35 feet wide by 100 feet deep lot as the conventional standard

for a Single and 20 feet by 100 feet for a Freehold Townhouse. For comparative purposes, the 35' x 100' Single lot size was deemed most appropriate because it yields similar house sizes to ADS housing. As well, there is an abundant supply of 35' lots in the marketplace and they have accounted for the vast majority of new Single Family home sales over the past 18 months in Ottawa-Carleton.

In addition, to further facilitate a realistic comparison between conventional and alternative standards, Brethour Research provided a dollar value for the savings that could be achieved with ADS. These dollar values were extrapolated from the RMOC's previous report on ADS, the Province of Ontario's study of ADS and from consultation with local planners and builders. The findings indicate that a sum of \$9000-\$9500 can typically be saved per unit when developed in an ADS format. Because there is a more significant difference in the lot widths of Singles (35' vs 26') compared to Townhomes (20' vs 18'), more savings accrue to Singles. For the Total Package of ADS, Brethour Research used an estimated \$12,500 of savings for a Single and \$5,500 for a Townhouse. The savings were then broken down for the primary components of ADS for Singles and Townhouses, these figures are presented in Table 8 below.

TABLE 8
ANTICIPATED DOLLAR VALUE SAVINGS OF "ADS"
BY SINGLES AND TOWNHOMES

COMPONENTS	SINGLES	TOWNHOMES
Lot Width	\$ 7500	\$1800
Lot Depth	\$ 4000	\$2900
Right of Way	\$ 1000	\$ 800
TOTAL PACKAGE	\$12500	\$5500

It should be clarified that these numbers have not been established with the aid of empirical analyses or calculations. Rather, they are simply rough estimates intended only

to assign an order of magnitude to each of the ADS components.

4.4.1 Likelihood to Purchase Total Package

Respondents were asked how likely they would be to purchase an ADS house, weighted against the savings of a house with conventional standards. Respondents were to consider two houses, both of which were the same size and both meeting their housing requirements and preferences. In this way, respondents were evaluating alternative and conventional standards based not on the house itself, but the savings that could be achieved with ADS. Because some people are interested specifically in either a Single or a Townhouse and because each house type has different savings associated with it, the questions on primary components and total package of ADS were divided. Respondents were asked to answer the questions on Singles or Townhomes, depending on their purchase expectations. However, if they were not decided, they were to answer both.

4.4.1.1 Likelihood to Purchase Total Package - Singles

Only 3 of the 153 respondents chose not to answer this question. This reflects the desirability of owning a Single Family home and perhaps some optimism on the part of respondents that an ADS single would fall within their affordability range. Overall, desirability of the total package of ADS for singles was very strong. Sixty-six percent of respondents indicated they were either likely or extremely likely to purchase an ADS single (assuming a saving of \$12,500 compared to a conventional standards single). Figure 12 illustrates the likelihood to purchase a single with the total ADS package.

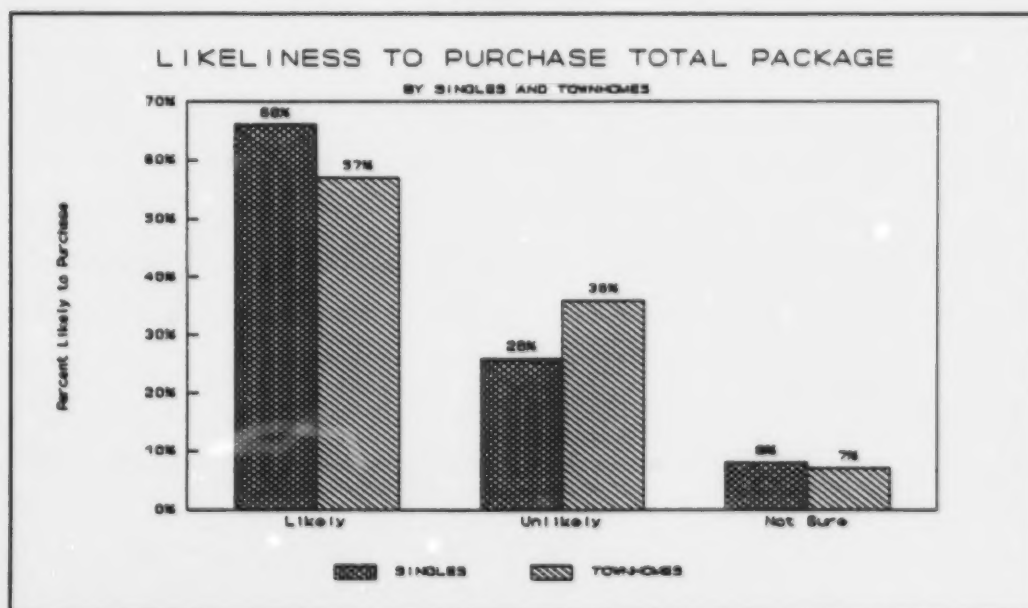
Further examination of the total ADS package for singles against other questions yields interesting results. The same percentage of respondents (66%) were likely or extremely likely to purchase an ADS single whether they currently rent, live with their parents or own and whether they were part of a couple or were single. Table 9 provides a breakdown of the percentage of respondents likely to purchase an ADS single, by various characteristics.

TABLE 9

WHO WOULD PURCHASE AN "ADS" SINGLE?

	WOULD PURCHASE
Expect to purchase a Single	61%
Expect to purchase a home under 1800 sq.ft.	78%
Expect to purchase within 3 years	74%
Expect to pay under \$160,000	75%
Are under 40 years old	66%
Are over 40 years old	60%
Have household Income under \$40,000	69%
Have household Income between \$40,000 - \$80,000	71%
Have household Income over \$80,000	39%

FIGURE 12



Overall, the questionnaire results suggest that there is considerable demand for an ADS single - given a possible \$12,500 of savings - across a broad spectrum of people interested in purchasing a more affordable home. As mentioned earlier, ADS could provide a fairly conventional floor plan for a Single under 1800 sq.ft. Of those respondents who expected to purchase a single under 1800 sq.ft., 68% indicated they were likely to purchase an ADS Single. Given that the current housing market - and the expected market over the next 3 years - is most active with affordable homes, and that Singles under 1800 sq.ft. are in higher demand than larger Singles, builders should take note that two thirds of this group are interested in the total package ADS Single.

4.4.1.2 Likelihood to Purchase Total Package - Townhomes

Overall, respondents favored the total ADS package for townhomes, but by a slightly smaller margin than for Singles. Fifty-seven percent said they were likely or extremely likely to purchase an ADS Townhome, and 36% were unlikely or extremely unlikely. Seven percent said they were not sure if they would purchase an ADS Townhome for a saving of \$5500 (compared to a conventional standards Townhome). These percentages are summarized in Figure 12. Table 10 below presents a breakdown of characteristics for those interested in purchasing as ADS Townhome.

Generally, support for ADS Townhomes was quite strong. A number of respondents answered that they expect to purchase a Single, but nevertheless answered the question on total package ADS Townhomes. When these responses are excluded and just those who expect to purchase a Townhome are counted, then 71% of these respondents would purchase an ADS Townhome. Furthermore, of those who intend to purchase a townhome under 1800 sq.ft., 72% were either likely or extremely likely to purchase a total package ADS Townhome.

TABLE 10
WHO WOULD BUY AN "ADS" TOWNHOME

OF THOSE WHO ...	WOULD PURCHASE
Expect to purchase a Townhome	71%
Expect to purchase a home under 1800 sq. ft.	59%
Expect to purchase within 3 years	63%
Expect to pay less than \$140,000	73%
Are under 40 years of age	57%
Are over 40 years of age	57%
Have Household Income under \$40,000	80%
Have Household Income between \$40,000 - \$80,000	61%
Have Household Income over \$80,000	31%

As was mentioned frequently in the focus groups, affordability is the critical factor. Even though \$5,500 may not seem like a substantial savings, it is often the difference between ownership and renting for first-time buyers. To quote one focus group participant, "I don't care about the size of my lot, it's the size of the house that matters. If I can save \$5,500 bucks for the same size house, then I'll take it (the ADS Townhome)."

4.4.2 Likelihood to Purchase by Component

The characteristics of ADS were broken down into components to evaluate consumer acceptance of each one on an individual basis. It might have been the case for example, that home buyers would be in favor of all ADS as long as their lot width conformed to conventional standards. To evaluate this, a separate question was posed for each of the following components: Lot width - Singles and Townhomes, Front Yard Setback, Back Yard Setback, Lot Depth - Singles and Townhomes, Door-to-Door Separation and Right-of-Way. Each Component had a dollar value savings associated with them (see Table

8). No dollar value was assigned to Front and Back yard setbacks, nor Door-to-Door separation as these were accounted for in the savings of the primary components.

Respondents were asked to consider each component in isolation from the others. For example, the question on lot width for Singles showed a conventional lot of 35' X 100', and the ADS lot shown was 26' X 100'. This facilitated response on an individual component basis. Furthermore, as was the case for the total ADS package, respondents were told to assume that the conventional and alternative standard houses were of equal size and that both met their requirements.

A summary of respondent's likeliness to purchase by individual ADS component is provided in Table 11. The percentages do not add to 100% for those that would or would not purchase because for each component the balance represents those that answered "not sure".

TABLE 11
LIKELINESS TO PURCHASE AN "ADS" HOME BY EACH COMPONENT

COMPONENTS	WOULD PURCHASE	WOULD NOT PURCHASE
Lot Width - Singles	52%	44%
Lot Width - Towns	56%	30%
Front Yard Setback	62%	33%
Back Yard Setback	44%	52%
Lot Depth - Singles	51%	37%
Lot Depth - Towns	52%	36%
Door-to-Door Separation	51%	45%
Right-of-Way	52%	44%

As the table illustrates, generally the majority of respondents were either likely or extremely likely to purchase a home with each of the ADS components, but only by a slight margin. The two exceptions are front yard and back yard setbacks. While 62% of respondents would purchase a home with a reduced front yard setback, only 44% were in favor of a reduced back yard setback. The majority of respondents (52%) were unlikely or extremely unlikely to purchase a home with a shorter back yard. While this was certainly the least popular component, part of respondents' reluctance could be attributed to the fact that there was no saving associated with a reduced back yard setback in the survey questionnaire. When a dollar value was attributed in the question on lot depth, 51% and 52% indicated they were likely to purchase a single or townhouse (respectively) with a shorter lot depth.

FIGURE 13

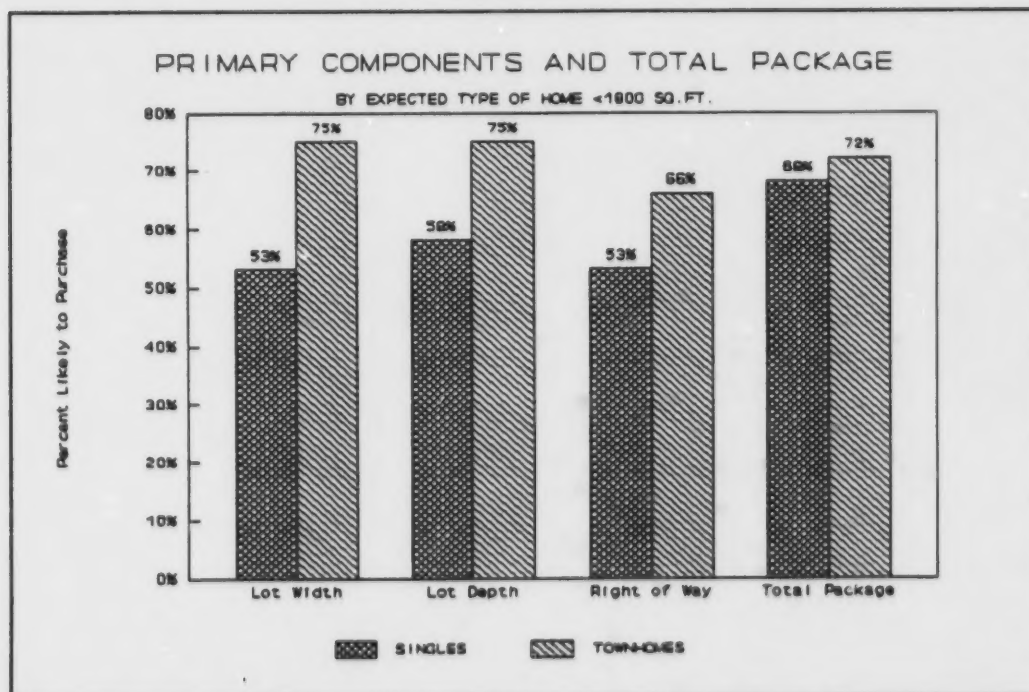


Figure 13 illustrates the likeliness of respondents to purchase a home with the primary ADS components and the total ADS package, for those expecting to purchase a Single or Townhouse under 1800 sq.ft. In each case, the majority of these purchasers would purchase a home with ADS. Support for the total ADS package is fairly equal between Singles (68%) and Townhomes (72%). However, for each of the primary components, a reduced proportion of respondents expecting to purchase a Single was lower. This may suggest that potential Townhome buyers are more attuned to individual savings than Single purchases. Typically, Townhome purchasers are more price sensitive than single purchasers. Nevertheless, respondents interested in a home size that ADS housing could satisfy - whether it be a Single or Townhome - were interested in the savings that could be achieved for each of the primary components and the total package.

4.4.3 Acceptance of Each ADS Component and the Total ADS Package

While respondents were generally in favor of each of the ADS components, the question remains as to the relationship between acceptance of any one ADS component and acceptance of the total ADS package. Is it the case for example, that respondents who would be likely to purchase a Single on a narrower lot, would nevertheless be unlikely to purchase a Single with the total ADS package?

Correlations were performed on the responses for ADS components and the total ADS package. In almost every case, there was a strong correlation between responses. That is, respondents that were extremely likely to purchase a home with a narrower lot width, for example, were also extremely likely to purchase a home with the total ADS package. Similarly, those who were extremely unlikely to purchase a home with a narrower lot width were extremely unlikely to purchase a home with the total ADS package. This relationship held true for each component and for the total ADS package for Singles and Townhomes.

These results indicate a consistency of opinion on ADS and strongly suggest that savings are the critical motivating factor. If a consumer is interested in the savings to be achieved from one of the ADS components, they will likely be interested in the savings to be achieved with a house that incorporates all of the ADS components (the total package).

There has been some movement in the marketplace towards reducing frontage widths - 30' wide Single lots and 14' wide Townhomes. Generally, these have met with ready acceptance by consumers. The survey results indicate there is also demand for reduced lot widths, lot depths and right-of-ways, as a total package. Municipalities and builders should move to provide the full ADS package and not just narrower lot widths. The survey respondents represent a portion of the population which has a definite interest in the savings ADS can achieve.

4.5 COMMUNITY FORM AND HOUSING CHARACTERISTICS

This section outlines the preferences of respondents in terms of various community characteristics, and house design and features. The opinions presented were generally taken from the input received during the Focus Groups. A questionnaire is generally limited in its ability to capture diverse opinions. Through the focus groups however, participants were able to respond to questions on an ADS community and specific house designs. Their input on community form and housing characteristics was at times illuminating and is summarized in each of the sections below.

4.5.1 THE COMMUNITY

Questionnaire respondents and focus group participants were asked their opinions on a variety of characteristics which define a community. Topics included neighbourhood facilities, land use mix, intensification, parking, privacy, environmental concerns and others. The responses which follow are not particularly congruent with those that might have been expected. Generally, respondents were fairly critical of the types of neighbourhoods which have been developed over the last 10+ years throughout Ottawa-Carleton. Many respondents saw ADS housing as an opportunity to evolve a new kind of community. These preferences, as well as the concerns expressed, are presented herein.

4.5.1.1 Neighbourhood Facilities

While the primary objective of ADS is to provide more affordable housing, there is a secondary objective of creating neighbourhoods that have less reliance on the automobile. In this context, there has been interest in providing a number of neighborhood facilities within walking distance of homes. Questionnaire respondents were asked to rank their preferences for having various facilities within a five minute walk of the home they expect to purchase. At the same time however, there is concern that the NIMBY attitude may contradict people's desire to be close to these facilities. To address this concern, respondents were asked if they would be willing to purchase a home adjacent to each facility. Finally, there is concern that neighbourhood facilities would be under-utilized in favor of larger scale facilities. Respondents were asked how many times per month they would use each of the facilities if they were within a five minute walk. The findings for each of these questions is presented in Table 12 below.

TABLE 12
NEIGHBOURHOOD FACILITIES

NEIGHBOURHOOD FACILITY	RANK WALKING DISTANCE	WOULD LIVE BESIDE	HIGHEST FREQUENCY OF USE PER MONTH
Convenience Store	1	18%	10+
Dry Cleaners	6	9%	1
Day Care Facility	5	23%	0
Postal Outlet	4	28%	2-3
Community/Rec/, Centre	2	43%	4-6
Park/Tot Lot	2	73%	4-6

The facilities respondents most wanted within walking distance were a convenience store, a recreation or community centre and a park or tot lot. In fact, the desire for each of these was almost equal and universal. Most respondents said they would use these from once to 2 or 3 times per week. However, the majority of respondents do not want to live beside any of the suggested facilities, with the exception of a park or tot lot. Focus group participants expressed a concern for parking, traffic, noise and reduced resale values in terms of living beside the facilities. Nevertheless, the general consensus was to include these (and other) facilities in an ADS community. Some respondents suggested locating these facilities as well as transit linkages at the hub of the neighbourhood but outside of the residential enclaves. This would facilitate access, minimize residential impact and provide a central meeting place for the community.

It was explained to focus group participants that retail and other facilities are only operational once a new neighbourhood has been sufficiently built. They were then asked if they would buy in the community if the facilities would not be present for up to two or three years. Again, support was very strong; participants said they would buy a home as long as they knew that the facilities would come along in time.

4.5.1.2 Land Use Mix

Including a mix of retail and other neighbourhood facilities involves a different land use mix than is common practice today. However, as stated, respondents were generally extremely supportive of this approach to community development. If these facilities were within walking distance, over 70% said they would in fact walk to them - rather than take the car.

Another different form of land use that respondents were in favour of was the mixing of housing types. Focus group participants were unanimous in supporting mixing all forms of housing types. They felt that putting blocks of townhomes between and amongst rows of singles would add "character" to the neighbourhood. As one participant explained, "I wouldn't want to live beside a block with 50 townhomes, but it would be fine if they were in small groups of three or four and mixed with singles."

Focus group participants also expressed no concern for varying the elevations of houses. Again they tended to feel that mixing bungalows, two and three-story homes would add "character" to their street. Participants were also supportive of allowing commercial businesses to operate from homes in their neighbourhood. Their only provision was that the home businesses not be "unsightly" - that is, excluding such businesses as: auto body repair, landscaping, etc. There was some concern for increased traffic and parking problems, but as long as these could be minimized, support was strong.

4.5.1.3 Intensification

ADS necessarily implies an intensification of land use - the house yield per acre increases. Respondents were asked in the focus groups how they felt about being closer to their neighbours - on the sides and in the back and front - as well as having more neighbours within a designated area. While participants did not seem to have any major qualms with higher density, two concerns emerged that tended to be universal. One was a concern for privacy and the other was parking.

The concern for privacy tended to focus on the reduced back yard space. Respondents were curious if there would be any restrictions on building fences or planting shrubbery in their yard. They also wanted to know if builders would provide landscaping and felt that this might be a way to reduce the impact of closer proximity with their neighbours. At the same time however, many participants felt that intensification might provide desired opportunities to get to know their neighbours. Those in favour of ADS housing tended to say that while privacy might be reduced, the result might be a closer, more dynamic neighbourhood.

The other concern respondents had regarding higher densities focused on the reduced Right-of-Way width and the parking problems it might cause. Respondents tended to feel that parking on one side of the street might not be sufficient. Participants were quick to point out that in many cases, the garage is used for general storage, not for the car. With driveway space for one vehicle, they wondered if the street would accommodate the overflow. To resolve this, some suggested that a small parking lot be provided at the community focal point or that its impact be minimized with shrubbery. Others suggested that with a more vital neighbourhood, any parking concerns could be solved internally. While no clear resolutions emerged over parking concerns, participants generally seemed to feel that it would be a compromise they would be willing to make, if affordable home ownership could be realized.

One further point should be made about intensification. Questionnaire respondents were asked if it was important to reduce the impact of housing on the environment by providing "more compact, efficient communities." While this was a somewhat biased question, 65% of respondents said it was important. The issue was also addressed in the focus groups. While the environmental benefits of intensification were not a critical issue for most participants, the general sentiment seemed to be positive.

4.5.2 HOUSE DESIGN

Focus group participants were shown a number of floor plans illustrating various types and sizes of homes. The drawings were used to gauge support and dissent on particular issues, but also to act as a catalyst for further discussion. These drawings can be found in Appendix 5.

Generally, participants seemed to prefer fairly conventional housing components. They were looking for three bedrooms, a reasonable size master bedroom, an eat-in kitchen, and a single car garage (double if possible) - all features that are common in today's housing market. There were however some concerns and different expectations relating to ADS housing; those relating to specific house types are outlined in the appropriate sections below.

The primary concern respondents had in terms of housing, was a fear that quality would be reduced. Respondents wanted their homes and those of their neighbours to last, to be easily maintained and to be able to attract good resale values. They were concerned that builders, striving to maximise affordability, would compromise building construction. However, this fear extended only to construction, and not the choice of materials. That is, participants were prepared to make upgrades to their home over time, but they wanted assurances that the overall quality would be maintained.

In terms of house design, participants suggested a number of changes that differed from the illustrations provided and sometimes from conventional house designs. All focus group participants were unanimous for example, in insisting that a two (or more) story home must have a ground/main level powder room. At the same time however, most suggested that they did not need a full bath off the master bedroom. A half bath would be preferred and the extra space could be used for either a shower and additional closet space or for a laundry room. Typically, most new Singles and Freehold Townhomes

over 1400 sq. ft. have 2.5 bathrooms, with a full ensuite off the master bedroom.

Another diversion from typical floor plans involved the kitchen. While respondents thought that having an eat-in kitchen was highly desirable, many suggested that if it was not going to be reasonably accommodating in terms of space, "then lose it". They suggested that if a table for four could not fit comfortably, then the eat-in kitchen space should be used to make the functional part of the kitchen more spacious and/or to better integrate the kitchen and dining room.

Similarly, in terms of having both a family room and a living room, most participants expressed their feeling that one of the rooms was redundant. They would prefer having a family room and a better kitchen and dining/eating room, than having all four rooms. It would seem that respondents are fully aware that compromises and trade-offs will need to be made in terms of the space they will be able to afford. Most respondents seemed to prefer more functional, pragmatic designs to house plans that traded flourish for useable space.

4.5.2.1 Single Family Homes

Particular to two-story Single Family homes, focus group participants expressed a strong desire for a Single that could be expanded - a "grow" home. They were especially interested in a Single that would include the exterior shell, but could be purchased with one or more rooms unfinished. They were also particularly keen about finishing space in the basement. It is clear that owning a Single is the ideal for most potential home purchasers and the focus groups seem to suggest that buyers would be willing to make a lot of sacrifices if it would mean affordable home ownership.

4.5.2.2 Bungalows

As is typical in the current market, participants interested in bungalows were predominantly empty-nesters who were over fifty years of age. And as is typical, this

group has very specific ideas about the home they want to buy. Their primary interest is that all of their living space is on one floor - barrier-free living. While this may seem customary, it does involve bringing the laundry room up from the basement and putting it on the main level. This is not always easy to accomplish, with just 1000-1400 sq.ft. - which is the size home this group wants. However, those interested in a bungalow only said they needed two bedrooms and 1.5 bathrooms. ADS housing could only accommodate about a 1000 sq. ft. bungalow (on a "standard" lot) before exceeding side yards and setbacks. Focus group participants were generally agreed that the second bedroom could be moved to an upstairs loft - this however, was not ideal. One final point is that these 'move-down' buyers are typically coming from larger homes and room sizes and storage should be maximized. For example, they likely would move down with their current dining room set, and would require a good size room in which to house it.

4.5.2.3 Townhomes

The focus group participants expecting to purchase a Townhome generally had typical expectations in terms of unit design. However, their expectations were marked by one characteristic more than other home buyers - flexibility. It seems that those expecting to purchase a townhome are most amenable to any development standards or design changes that will allow them to become home owners. They expressed no concern for 2.5 or three story units, had few expectations in terms of features - like a fireplace, ceramic tile flooring etc. - their strongest drive incorporates the following four criteria:

- Location
- Price
- Size
- Quality

Builders that can meet their expectations - particularly on price - should achieve a significant number of sales.



5.0 CONCLUSIONS: A MARKETING STRATEGY

5.1 SUMMARY OF CONSUMER OPINION

There are opportunities for ADS housing in Ottawa-Carleton, but it is not for everyone. It is not meant to replace conventional standards housing, but to provide a more affordable alternative in the marketplace. The survey results clearly indicate that there is considerable demand for ADS housing. While ADS acceptance and demand are not universal, they are certainly substantial. These conclusions are emphasized by the following findings:

- 68% of respondents that expect to purchase a Single under 1800 sq.ft. said they were likely or extremely likely to purchase an ADS single if they could save \$12,500 from the same size conventional standards house.
- 72% of respondents that expect to purchase a Townhouse under 1800 sq.ft. said they were likely or extremely likely to purchase an ADS townhome if they could save \$5,500 from the same size conventional standards townhome.

In short, the majority of potential home buyers looking for a more affordably priced home in the size range that ADS housing could satisfy, are prepared to accept ADS for the savings it can provide.

Furthermore, municipalities and builders should strive to offer housing that incorporates all of the ADS components. As noted, respondents that are interested in the savings to be achieved through the implementation of one of the ADS components, are equally interested in the savings the total ADS package can provide. These consumers are prepared to accept increased densities, if it provides the opportunity for affordable ownership of a house that meets their requirements.

Many potential buyers saw ADS housing as a new opportunity to create a more efficient, more dynamic, more personable community. There was widespread support for varying the mix of housing types, for incorporating a community focal point, a convenience store and other facilities and for providing more access to park land. These consumers even suggested they would be willing to purchase in this new community, before these amenities were fully functional, as long as they would be realized. Certainly potential buyers had concerns about parking and privacy, but they seemed convinced that with the right planning, an ADS community would be a success.

5.2 TARGET MARKETS AND BUYER PROFILES

Section 3.4 outlined three market niches that dominate housing sales over the next three years. Table 13 below summarizes these buyer groups in terms of their change in family status and their typical home preferences.

TABLE 13

BUYER PROFILES AND HOUSING PREFERENCES

BUYER GROUP	FAMILY STATUS CHANGE	HOUSING PREFERENCES
Entry-Level	Marriage (Children)	Affordable, 2-3 bedroom Freehold Singles and Townhomes, 1000 - 1800 sq.ft.
Single	Separation or Financial Stability	Affordable, 2-3 bedroom, Freehold Singles and Townhomes, 1000 - 1800 sq.ft.
Empty-Nesters	Children leave Home	Affordable, 2 bedroom, Freehold or Condominium Bungalow, 1000 - 1400 sq.ft.

The common denominator with these three groups is that these buyers all have a concern for affordability and a desire for a relatively small house (under 1800 sq.ft.). This,

along with the vital role they will play in the housing market over the next three (or more) years, make each of these buyer groups an ideal target market for ADS housing.

Table 14 provides a breakdown of the target market buyers groups and the likeliness to purchase an ADS home of those respondents that fall into this group. While these buyer groups do not represent all 153 respondents, in each case, for both Singles and Townhomes, the majority of these potential buyers were likely or extremely likely to purchase an ADS home. As mentioned previously, ADS housing is not for everyone nor is it for everyone in these buyer groups. However, the majority have expressed a distinct interest in ADS housing which reinforces entry-level single and empty-nester buyers as the prime target markets.

TABLE 14

BUYER PROFILES AND LIKELINESS TO PURCHASE AN "ADS" HOME

BUYER GROUP	TYPICAL CHARACTERS	LIKELINESS TO PURCHASE TOTAL ADS PACKAGE	
		SINGLES	TOWNHOUSES
Entry-Level	25 - 40 Home < 1800 sq.ft. Couple Have owned 0-1 home	82%	55%
Single	25 - 45 Home < 1800 sq.ft. Single	78%	69%
Empty-Nesters	55+ Bungalow < 1400 sq.ft. No children at home	60%	*

* Insufficient number of respondents

5.3 RECOMMENDED PROJECT SPECIFICATIONS

In order to forecast market absorption rates for housing developments implementing ADS, it is necessary to create a "mock-up" or sample project. The elements of this project have been established considering the previous findings of this market study, especially in terms of product mix.

In terms of total project size, a land parcel of approximately 10 acres is suggested. At a gross density of 15 units per acre, this would yield 150 units in total. This is considered to be a housing project of sufficient size to produce the economies of scale that many builders require to build successfully. Also, a 150 unit project is large enough so that the end product can take on the qualities of a new neighbourhood with its own identity. Conversely, a 150 unit project is not so large that a builder could not be "in and out" in an reasonable length of time.

Based on the results of the consumer opinion surveys, the product mix and house size ranges illustrated below at Table 15, are recommended for the sample project. In other words, the following are the recommended ingredients for a successful ADS project in Ottawa-Carleton given the current (i.e. 1992) market situation:

TABLE 15

SAMPLE PROJECT SPECIFICATIONS

Product Type	Style	Minimum Unit Size (sq.ft.)	Maximum Unit Size (sq.ft.)	Total # Units
Single Family	Two Stories	1000	1800	50
	Bungalow	800	1000	25
Freehold Townhomes	Two-Three Stories	900	1400	75
TOTAL # UNITS				150

These specifications reflect the findings that the majority of ADS house buyers are most interested in housing 1000 - 1400 sq.ft. in scale. In the Single Family market, there is also a large group interested in housing 1400 to 1800 sq.ft. in size.

Regarding the single detached bungalows, the ADS format physically restricts the ability of individual lots to produce more than 1000 sq.ft. on one level. In fact, it may be found that lots measuring 26 ft X 75 ft may not be able to produce bungalows greater than 800 sq.ft. However these units could be constructed with lofts, for example, where the extra required space could be produced.

The Freehold Townhomes are suggested to range in size from 900 to 1400 sq.ft. In the current conventional housing marketplace in Ottawa-Carleton, this product is generally introduced in the range of 1100 to 1800 square feet. Therefore, the suggested size range in an ADS format is considerably smaller, and this has been justified by the consumer opinion response.

Freehold Townhomes are not recommended to be delivered as bungalows, but rather, are to be entirely two to three stories. Although bungalow townhomes can be delivered in ADS (the building envelope is almost identical to that of Singles), it is believed that this product form is unnecessary. The majority of bungalow buyers prefer a detached product when it can be delivered at a low price point.

Regarding the number of bedrooms, both singles and townhomes should contain a mix of two and three bedrooms. The smaller units, especially those under 1100 sq.ft. will usually be two bedroom models. As mentioned previously in the study, it is difficult to produce a third bedroom in this amount of gross floor area, and the other house elements including kitchen, dining/eating area, living area, and half bath are absolute necessities on the ground floor in two level units.

5.4 PRICING RECOMMENDATIONS

When discussing house pricing issues, it is important to quickly review the major cost components of new home construction. In summary, they are:

- serviced lot costs
- development charges and fees
- construction costs
- marketing costs

The first two cost components vary from one location to another. For example, land costs may be different (usually higher) in inner-city areas than in sub-urban "greenfields" areas. Similarly, development charges can vary from municipality to municipality, by product type, and by square footage. For example, development charges in Nepean (Longfields) are over \$7,000 more than in the City of Ottawa. In some cases, this has the effect of almost offsetting higher land costs in Ottawa.

Also, municipalities benefit from discounts ranging from \$3,059 to \$4,225 (Gloucester) for housing under 1100 sq.ft. in size.

Regarding construction costs and marketing costs, these are generally consistent from one area to another within Ottawa-Carleton.

Aside from the house cost components, the most significant factors that influence home prices are market forces. These include supply and demand situations, and particularly the economic environment. In 1992, for example, there is a very tight and competitive market with a reasonable land supply, and home prices have been kept down. Some builders are discounting their land value in the price of new homes, and are delivering product at 1990 prices. Housing in the Hunt Club area in the City of Ottawa, for example, is now competitively priced with identical housing in some areas outside the

Greenbelt.

Above all else, it is the market which sets house pricing. Therefore, in order to establish a recommended price schedule for the sample ADS project, it is necessary to review the price of comparable housing built in conventional neighbourhoods. This sets the benchmark from which to work backwards.

Since there are normally marked differences in house prices inside the Greenbelt versus the Kanata/Stittsville, the South Urban Centre, and Orleans, it is useful to examine ADS house pricing in both environments.

Table 16 below is a summary of the recommended pricing schedule for a sample ADS project inside the Greenbelt.

TABLE 16

RECOMMENDED "ADS" PRICING SCHEDULE INSIDE THE GREENBELT

PRODUCT TYPE (Style)	SIZE RANGE (sq.ft.)	ADS		CONVENTIONAL *	
		Price \$ \ sq.ft.	Total Asking Price	Price \$ \ sq.ft.	Estimated Price
Single (2 Stories)	1000	116	\$115,500	128	\$128,000
	1800	98	\$176,500	105	\$189,000
Single (Bungalow)	800	116	\$ 93,100	132	\$105,600
	1000	118	\$117,500	130	\$130,000
Freehold Townhomes	900	106	\$ 95,300	111	\$100,800
	1400	96	\$134,500	100	\$140,000

*SOURCE: BRETHOUR RESEARCH NEW HOME MARKET REPORT
JULY, 1992

This pricing schedule is based on a comparative analysis of small homes currently offered for sale in 1992 in the Hunt Club area of the City of Ottawa. As mentioned previously, housing in this area is competitively priced with housing in sub-urban areas, although, historically this has not been the case. This is the only area currently inside the Greenbelt where housing is being constructed in significant volumes that caters to the bottom-end of the housing marketplace. Housing in the CentrepoinTE area in Nepean, for example, is now almost entirely designed to attract a more affluent market. Hence, Hunt Club remains as the only available area from which to measure comparable house prices for an affordable format, inside the Greenbelt.

It is possible that in the near future, there may be other areas inside the Greenbelt which are developed to produce a range of housing types. These may include sites now in the planning process such as the Clyde\Merivale development (RMOC and Assaly) and the CMHC Aviation Parkway lands (CMHC and Assaly). Other longer term development sites such as LeBreton Flats and C.F.B. Rockcliffe may also be candidate sites for ADS housing. Should any of these sites be developed on the short term for ADS housing, it is quite likely that the land component of the house costs will be much higher than what is common now in the Hunt Club area. Hence, the production cost of ADS housing will be higher, and the deliverable price will also be higher accordingly. However, an ADS project inside the Greenbelt could provide more efficient use of expensive land. In these situations, the recommended asking price of ADS housing could possibly be 20% higher than illustrated at Table 16. There is, however, no data on land prices for these areas available to this study at this time.

The recommended prices schedule for ADS housing outside of the Greenbelt is presented below at Table 17.

TABLE 17

RECOMMENDED "ADS" PRICING SCHEDULE OUTSIDE THE GREENBELT

PRODUCT TYPE (Style)	SIZE RANGE (sq.ft.)	ADS		CONVENTIONAL *	
		Price \$ \ sq.ft.	Total Asking Price	Price \$ \ sq.ft.	Estimated Price
Single (2 Stories)	1000	116	\$115,500	128	\$128,000
	1800	93	\$167,500	100	\$180,000
Single (Bungalow)	800	116	\$ 93,100	132	\$105,600
	1000	118	\$117,500	130	\$130,000
Freehold Townhomes	900	104	\$ 93,500	110	\$ 99,800
	1400	94	\$131,700	98	\$137,200

*SOURCE: BRETHOUR RESEARCH NEW HOME MARKET REPORT
JULY, 1992

For both pricing schedules, the price for ADS housing has been established by merely subtracting the anticipated ADS cost savings from the price of comparably sized conventional product. The cost savings have been identified as being \$12,500 for Singles and \$5,500 for Freehold Townhomes. For example, for a 1000 sq.ft. home outside the Greenbelt (if it were available) the conventional price would be approximately \$128,000 considering the current marketplace. A comparably sized ADS home would therefore be \$12,500 more affordable, at \$115,500.

5.5 STRATEGIES FOR SUCCESS

The questionnaire and focus group respondents proved that there is acceptance and demand for housing and communities based on ADS. At the same time however, the results provided insight into factors that would facilitate the successful implementation

of ADS. These factors are summarized below according to their housing and community orientation. There was one factor that is critical to the success of providing ADS housing that supersedes the other factors below: PRICE, PRICE, PRICE.

Without question, the surveys emphasized that affordability would be the primary motivation to purchase an ADS home. The more attractive an ADS home is priced, the more demand it will satisfy. An ADS home must be lower priced than its conventional standard equivalent. The price ranges recommended in Section 5.4 are maximums. If possible, ADS housing should be delivered at even lower prices to be most successful.

In addition to sharp pricing, the projects must have certain key ingredients. The recipe for success would read as follows:

Housing Characteristics

- Emphasize quality of construction
- Mix Singles, Bungalows and Townhomes
- Highlight distinctive character of each home
- Avoid "cookie-cutter" image
- Offer 2 and 3 bedroom designs
- Offer "grow" homes
- Provide opportunity to finish basement
- Use larger lots to offer larger Bungalows and some 4 bedroom Singles
- Provide a landscape package - especially in the rear yard
- Design with privacy to be maximized
- Offer homes with very basic finishing specifications

Community Characteristics

- Emphasize that this development is a new/different kind of community, especially regarding: friendliness, efficiency, the environment and safety
- Avoid with diligence anything which may stigmatize the community as "cheap", "sub-sized" or as a "project"
- Provide for the eventual inclusion of a community focal point, a general store, recreation facilities, etc.
- Park space should be maximized and readily accessible

Key Marketing Principles

- Do not market this as alternative, and ignore the deviations from conventional standards in promotion
- Avoid catchy nomenclature for the project ... let the price do the talking
- Project names should be simple but emphasize the community appeal for example, "The Village Square" or "Neighbour's Town".

APPENDIX 1

SMALL HOMES SELECT PROJECT REVIEW

1. Club Citadelle - Cumberland

This stacked townhouse project was built in Cumberland between 1985 and 1987. It was a very successful project geared to singles and young couples at a very attractive price point. The project had a lifestyle attraction based on an amenity package which included tennis courts, pool and recreation building. This project was developed during a period when new home prices were rising quickly in Orleans.

Builder:	Timberlay Homes
Project:	Club Citadelle
Location:	Cumberland
Product Type:	Stacked Homes
Total Units:	270
Phase 1 -	1985 - 185
2 -	1986 78
3 -	1987 7
Price Range:	\$59,900 - \$83,900
Sq. Ft. Range:	860-1418
Price/Sq.Ft.:	\$69.65 - \$59.16
Lot Frontage:	N/A
Garage:	No - surface parking
Active Date:	June '85 - March '87
Sales Rate:	7.9 per month
Comments:	• Very successful - Young couples and singles • Lifestyle appeal regarding facilities • Chance for renters to achieve ownership

2. Thorncliffe Village - City of Ottawa

This is a unique project founded on a joint venture land development project between the City of Ottawa and Domicile Developments Inc. This 15 acre project located in Ottawa East has produced some 234 public non profit housing units and some 115 private on-street and condominium townhouse units.

The project is well underway. The on-street and condominium townhouse lots are 4 and 4.5 metres wide which is well below conventional lot widths for similar product. Its inner city location and proximity to public transit together with good product at a sharp price point have generated some 28 sales.

Builder:	Domicile Developments
Project:	Thorncliffe Village
Location:	Ottawa East
Product Type:	On-Street Townhomes
Total Units:	Ongoing project
Price Range:	\$114,900 - 127,900
Sq. Ft. Range:	1398 - 1640
Price/Sq.Ft.:	\$82-50 - \$78.00
Lot Frontage:	13 and 14.7 feet
Garage:	Garage & Carport
Active Date:	January 1992
Sales Rate:	4 sales per month
Comments:	• Project part of a pubic/private sector joint venture -includes some 234 units of various non-profit projects in stacked and mid rise form. • Frontage is 14' & has not impaired sales - inside greenbelt - cheaper freehold towns.

3. Hunt Club Court - City of Ottawa

This is a current and ongoing stacked townhome project by Richcraft Homes in Ottawa South. The project has attracted a single and young couple market. It is well located and presented by the builder. The project has an excellent price point in a generally expensive market area.

Builder:	Richcraft Homes Limited
Project:	Hunt Club Court
Location:	Ottawa South
Product Type:	Stacked Towns
Total Units:	Ongoing project - 147 sales to date
Price Range:	\$97,900- 117,900
Sq. Ft. Range:	1210 - 1310
Price/Sq.Ft.:	\$80.90 - \$90.00
Lot Frontage:	N/A
Garage:	No - Surface Parking
Active Date:	January 1990
Sales Rate:	4.7 sales per month
Comments:	• Successful project in Ottawa South - primary market is singles and young couples with no children and single parent with 1 child and divorced - Inside Greenbelt - City of Ottawa - most affordable towns.

4. Stonebrooke - Cumberland

This subdivision had the makings of a conventional single family project with homes built on 35' lots. However, in 1990, MacDonald Homes attempted to differentiate this subdivision from the rest of the 35' market, and introduced "Homes that Grow". Coupled with this modified Grow Home option on some models, and extremely competitive prices (i.e. less than \$130,000 in 1992) this turned out to be quite a successful new home project.

Builder:	MacDonald Homes Limited
Project:	Stonebrooke
Location:	Fallingbrook - Orleans
Product Type:	Singles
Total Units:	99 Sold Out
Price Range:	\$124,900 - \$184,900
Sq.Ft. Range:	900 - 2079
Price/Sq.Ft.:	\$139.78 - \$88.94
Lot Frontage:	35'
Garage:	Single car & some over-sized
Active Date:	September '89 - May '92
Sales Rate:	3 per month
Comments:	• Until '91 this was a fairly conventional small Singles project. Late that year they introduced "Homes that Grow". These were a completed shell, but had various portions unfinished by the builder that could be finished over time. • Allowed project to offer lowest priced Singles in the Region. With "Grow Homes", sold an average of 6.5/month.

5. Crown Pointe - Cumberland

MacDonald Homes has focused on the entry level buyer in this ongoing project offering both on-street town homes and small singles at very competitive prices.

The builder's experience with the small singles also confirms an interest from cash out move down buyers. This market group is usually near or at retirement and is looking for smaller accommodation at a reasonable price.

Builder:	MacDonald Homes Limited	
Project:	Crown Pointe	
Location:	Fallingbrook - Orleans	
Product Type:	<u>Townhomes</u>	<u>Singles</u>
Total Units:	99 ongoing	366
Sales	7	6
Price Range:	\$114,900 - \$133,900	\$134,000-\$168,900
Sq. Ft. Range:	1094 - 1480	980 - 2027
Price/Sq.Ft.:	\$105.03 - \$90.47	\$136.73 - \$83.33
Lot Frontage:	20'	35'
Garage:	Single Car	Single Car
Active Date:	July 1992	May 1992
Sales Rate:	7 per month	2 per month
Comments:	• A new project offering the lowest priced Freehold Towns in Region and amongst the lowest priced Singles. Appeals to predominantly first and second-time buyers. One model single is a 980 sq.ft., 2 bedroom bungalow that attracts both entry-level and move-down buyers. • Destined for strong sales.	

6. Bridlewood - Kanata

Urbandale Construction has produced a very successful on-street townhome project in Bridlewood that is attracting both the entry level and move-down buyer. This project features a combination of good subdivision design, good product design, strong exterior elevations and a very sharp price point.

Builder:	Urbandale Construction
Project:	
Location:	Bridlewood - Kanata
Product Type:	On-Street Townhomes
Total Units:	Ongoing project - 106 sales to date
Price Range:	\$122,900- 145,900
Sq. Ft. Range:	1228 - 1832
Price/Sq.Ft.:	\$100.08 - \$79.64
Lot Frontage:	20 ft.
Garage:	Yes - one car
Active Date:	February 1991 - ongoing
Sales Rate:	5.8 sales per month
Comments:	● Excellent on-street townhome project - cross market appeal including entry level and move-down buyers

The Toronto and area housing market conditions over the last 2 years has also generated some innovative approaches to capture market niches and generate sales.

1. Interlot - Brampton

This is a single family home project developed on lots that are 33 feet wide. The lots however are "L" shaped to reduce lot depth and lot width at the rear of each house. The project has generated strong sales at a price point focused exclusively to the first time buyer. An issue that needs to be addressed with the interlot concept is privacy in the rear yard.

Builder:	Greenpark Homes
Project:	Interlot
Location:	Brampton
Product Type:	Single Detached
Total Units:	
Phase 1:	44
Phase 2:	
Price Range:	\$169,900- 179,900
Sq. Ft. Range:	1293 - 1416
Price/Sq.Ft.:	\$126.00 - \$131.00
Lot Frontage:	33 ft.
Garage:	Yes
Active Date:	September 90 - December 90
Sales Rate:	11 units per month
Comments:	● Interlocking L-shaped lots ● 1st time buyers only

2. Uni Quattro - Brampton

On the surface, these units appear to be conventional on-street townhomes in blocks of 4 units based on lot frontages of 18 to 20 feet. However, the product design allows for a standard door exit from the garage to the rear yard of the 2 interior units. As well, the front elevation of each 4 unit block is designed in a manor home style for greater curb appeal. The door access through the rear of the interior garages removes the need for access easements over the entire block.

Builder:	Greenpark Homes
Project:	Uni Quattro
Location:	Brampton
Product Type:	Attached
Total Units:	
Phase 1:	16
Phase 2:	
Price Range:	\$149,900
Sq. Ft. Range:	1222
Price/Sq.Ft.:	\$123.00
Lot Frontage:	18 - 20 ft.
Garage:	Yes
Active Date:	September 90 - December 90
Sales Rate:	41 units per month
Comments:	● Four homes per block ● Not considered a townhome ● Front elevation - manor home style - direct access to rear yard for all units

3. King Knoll - Brampton

This project consists of clusters of 4 condo units in a manor home style. The project produced strong sales based on a sharp price point for a good sized home.

Builder:	Town Wood Homes
Project:	King Knoll
Location:	Brampton
Product Type:	Quadroplex
Total Units:	
Phase 1:	44
Phase 2:	
Price Range:	\$149,900 - \$154,900
Sq. Ft. Range:	1326
Price/Sq.Ft.:	\$113.00 - \$117.00
Lot Frontage:	
Garage:	No
Active Date:	June 90 - December 90
Sales Rate:	6.3 units per month
Comments:	● Typical lot size for quad 20 by 40 meters ● Surface parking ● Condo fees \$106 per month for all units ● 4 unit manor home - condo ownership - sold out in 6 months - strong price point

4. Springdale - Brampton

Town Wood Homes has developed a very interesting project that has potential for two families to occupy one home on 1 lot. The house is designed to be either one large home or 2 homes with the 2nd home occupying the second floor with a direct side entry.

The home has potential for one owner, one owner plus a tenant or two separate owners. The home can also be converted back and/or forth at any time with minimal work.

Unfortunately, the high price point has been impossible to sell in the current local market.

Builder:	Town Wood Homes
Project:	Springdale
Location:	Brampton
Product Type:	Single Detached
Total Units:	
Phase 1:	26
Phase 2:	
Price Range:	\$256,900 - \$259,900
Sq. Ft. Range:	2361 - 2636
Price/Sq.Ft.:	\$99.00 - \$109.00
Lot Frontage:	41'
Garage:	Yes
Active Date:	November 91
Sales Rate:	N/A
Comments:	● Single family home convertible to two family

5. Sandalwood - Mississauga

This is a conventional walk-up garden home project in a community of some 1500 units being developed in Mississauga. However, the builder has created a sense of neighbourhood and identity with clusters of buildings and excellent attention to exterior elevations. The broad range of unit sizes has created home ownership opportunities for many entry level buyers.

Builder:	Lakeview/Antrex
Project:	Sandlewood
Location:	Mississauga
Product Type:	Garden Homes
Total Units:	
Phase 1:	150
Phase 2:	160
Price Range:	\$89,900 - \$154,900
Sq. Ft. Range:	545 - 1245
Price/Sq.Ft.:	\$124.00 - \$165.00
Lot Frontage:	
Garage:	Surface Parking
Active Date:	December 90
Sales Rate:	12 units per month
Comments:	• 1st time buyer - attention to exterior detail, elevations, real sense of community

6. Sandlewood - Mississauga

This first time buyer project has been successful for a number of reasons. Exterior elevations, unit sizes and price point are all by elements. The builder has also developed a successful sales program with 3 components. The first component is a conventional sales centre/model supported by media advertising, brochures, etc. The second component is based on the sale of "futures". Future buyers are encouraged to select a unit in a later phase at a price agreed upon today. The builder then opens a bank account in that person's name wherein the future purchaser can make monthly deposits against the purchase of the new home.

The third component of the sales program is a direct mail program to rental buildings. Included in the direct mail piece is an audio visual tape of the project that the viewer can watch and hopefully become interested in the project sufficient to visit the site.

This project is a good example of a builder with good product developing innovative ways of marketing.

Builder:	Lakeview/Antrex
Project:	Sandlewood
Location:	Mississauga
Product Type:	Stacked Townhomes
Total Units:	
Phase 1:	45
Phase 2:	108
Price Range:	\$139,900 - \$162,900
Sq. Ft. Range:	910 - 1357
Price/Sq.Ft.:	\$120.00 - \$154.00
Lot Frontage:	N/A
Garage:	Yes

Active Date:	December 90 - ongoing
Sales Rate:	8 units per month

Comments:	● 1st time buyer ● Walk-up units ● Bank Account - selling futures at a guaranteed price ● Direct Mail to rental buildings with an A.V. Tape
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APPENDIX 2

SURVEY QUESTIONNAIRE

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS SURVEY

The survey is designed to help us understand your future housing needs and preferences. Please answer as honestly and accurately as you can. In particular, please keep in mind that we are not looking for opinions on your "dream home", but rather, the next home you are most likely to purchase.

PART 1

The first part of the survey asks questions about your current housing situation and about the home you are most likely to purchase next.

1.1 What type of residence do you live in now?

- | | |
|--|--------------------------------------|
| ☐ Single Detached | ☐ Apartment |
| ☐ Semi-Detached | ☐ Other _____ |
| ☐ Townhouse | |

1.2 What is your current housing situation?

- ☐ Rent
- ☐ Live with parents
- ☐ Own. How many homes have you owned? ____

1.3 When do you intend to purchase a home?

- ☐ Within 1 year
- ☐ Within 2 or 3 years
- ☐ Probably within 5 years
- ☐ Not sure if I will purchase a home within 5 years
- ☐ I do not intend to purchase a home within 5 years

1.4 What type of home do you expect to purchase?

- | | |
|---|--|
| ☐ Single Detached | ☐ Condominium Townhouse |
| ☐ Semi-Detached | ☐ Condominium Apartment |
| ☐ Freehold Townhouse | ☐ Other _____ |

1.5 What size of home do you expect to purchase?

- | | |
|--|---|
| ☐ Less than 1000 sq.ft. | ☐ 1800 - 2200 sq.ft. |
| ☐ 1000 - 1400 sq.ft. | ☐ Over 2200 sq.ft. |
| ☐ 1400 - 1800 sq.ft. | ☐ Not Sure |

1.6 What is the minimum number of bedrooms you require in the home you purchase?

- | | |
|------------------------------|--------------------------------|
| ☐ One | ☐ Three |
| ☐ Two | ☐ Four |

1.7 Would you purchase a home that only has 2 bedrooms, but could be easily expanded to three bedrooms later?

- | | |
|--|--------------------------------|
| ☐ No - Definitely not | ☐ Maybe |
| ☐ Probably not | ☐ Yes |

1.8 What is the minimum number of bathrooms you require in the home you purchase?

- | | |
|--------------------------------|------------------------------------|
| ☐ 1 | ☐ 2 1/2 |
| ☐ 1 1/2 | ☐ 3 or more |
| ☐ 2 | |

1.9 How many cars are there in your household?

- | | |
|----------------------------|------------------------------------|
| ☐ 0 | ☐ 2 |
| ☐ 1 | ☐ 3 or more |

1.10 Do you expect to have a garage in the home you purchase and if so, how large?

- | | |
|--|--|
| ☐ No - I prefer no garage | ☐ Yes - a single-car garage |
| ☐ No - not necessarily | ☐ Yes - a double-car garage |

1.11 Do you intend to finish the basement (or have it finished) of the home that you purchase?

- | | |
|---|---|
| ☐ No/Probably not | ☐ Yes - Completely |
| ☐ Maybe | ☐ Not Sure |
| ☐ Yes - Part of it | |

1.12 Would you be interested in purchasing a home that could "grow" over time - that is, a home that would have rooms that you would finish as your space requirements increase?

- | | |
|--------------------------------|------------------------------|
| ☐ No | ☐ Yes |
| ☐ Maybe | |

1.13 Please indicate which of the following elevations and sizes of home would best suit your requirements.

- ☐ 1-storey bungalow, 700-800 sq.ft.
- ☐ 2-storey home, 900-1400 sq.ft.
- ☐ 3-storey home, 1200-2000 sq.ft.
- ☐ None of the above

- 1.14 In deciding on which home to purchase, obviously price is important. Please rank these other 6 criteria in order of their importance to your decision - where 1 is most important and 6 is the least important.

☐ Community Appeal
☐ Location
☐ Exterior Elevation
☐ Interior Layout
☐ House Size
☐ Lot Size

- 1.15 What is the maximum monthly payment - including mortgage principal, interest and property taxes - that you feel you could afford?

☐ Less than \$ 800	☐ \$1200 - \$1400
☐ \$ 800 - \$1000	☐ \$1400 - \$1600
☐ \$1000 - \$1200	☐ Over \$1600

- 1.16 What is the maximum down payment you are likely to be able to place?

☐ Under \$ 5,000	☐ \$20,000 - \$50,000
☐ \$ 5,000 - \$10,000	☐ Over \$50,000
☐ \$10,000 - \$20,000	☐ Not sure

- 1.17 What is the maximum price you expect to pay for the home you purchase?

☐ Less than \$ 80,000	☐ \$160,000 - \$180,000
☐ \$ 80,000 - \$100,000	☐ \$180,000 - \$200,000
☐ \$100,000 - \$120,000	☐ Over \$200,000
☐ \$120,000 - \$140,000	☐ Not Sure
☐ \$140,000 - \$160,000	

- 1.18 Where do you expect your next home to be? (Check all that apply).

Inside Greenbelt:

☐ Ottawa East/Gloucester
☐ Ottawa Central
☐ Ottawa South
☐ Ottawa West/Nepean

Outside Greenbelt:

☐ Orleans
☐ Barrhaven
☐ Kanata/Stittsville
☐ Rural Area

☐ Outside Ottawa-Carleton
☐ Not Sure

- 1.19 What distance would you commute in order to purchase an affordable home?

_____ km

PART 2

Neighbourhoods like Orleans, Barrhaven and Kanata have been planned using Conventional Development Standards. Each area is similar to suburbs across Ontario that have been developed over the past 10 to 20 years. The Regional Municipality of Ottawa-Carleton has been encouraging Municipalities to introduce Alternative Development Standards for some housing projects across the Region, where they see fit.

Development standards normally refer to such things as servicing requirements, zoning regulations, lot sizes, etc. Typically, the proposed new development standards involve having smaller homes, on smaller lots, with narrower streets.

This section of the survey considers Conventional and Alternative Development Standards. It provides you with the opportunity to express which development standard characteristics you would prefer when you purchase a home. Overhead sketches will be used to help provide a visual contrast between the two development standards. These images are examples of typical homes, lots, and streets for each development standard.

For each question in this section, please circle from 1 to 5 to rate how likely you are to purchase a home with Alternative Development Standards, where 1 is extremely likely, 4 is extremely unlikely and 5 is not sure. Please answer questions on Singles and Townhomes, unless you know you will definitely not be purchasing one of them, in which case you should answer only the questions that relates to the house type you desire.

LOT WIDTH

2.1 Singles: The top sketch illustrates a Single Detached house on a Conventional 35 foot wide lot. The house on the bottom represents the Alternative Standard of a 26 foot wide lot.

Assuming that both houses are the same size and that each meets your requirements, if the house on the narrower 26' lot (bottom) was \$7500 less expensive than the house on the Conventional 35' lot (top), how likely would you be to purchase the home on the narrower lot?

1	2	3	4	5
EXTREMELY LIKELY	LIKELY	UNLIKELY	EXTREMELY UNLIKELY	NOT SURE

Towns: The top sketch illustrates a Townhouse on a Conventional 20 foot wide lot. The house on the bottom represents the Alternative Standard of an 18 foot wide lot.

Assuming that both houses are the same size and that each meets your requirements, if the Townhouse on the narrower 18' lot (bottom) was \$1800 less expensive than the house on the Conventional 20' lot (top), how likely would you be to purchase the house on the narrower lot?

1	2	3	4	5
EXTREMELY LIKELY	LIKELY	UNLIKELY	EXTREMELY UNLIKELY	NOT SURE

FRONT YARD

- 2.2 *The Conventional standard for a front yard is 20 feet deep. The Alternative standard for a front yard is 10 feet deep.*

How likely would you be to purchase a home with a 10 foot deep front yard?

1	2	3	4	5
EXTREMELY LIKELY	LIKELY	UNLIKELY	EXTREMELY UNLIKELY	NOT SURE

BACK YARD

- 2.3 *The Conventional standard for a back yard is 25 feet deep. The Alternative standard for a back yard is 20 feet deep.*

How likely would you be to purchase a home with a 20 foot deep back yard?

1	2	3	4	5
EXTREMELY LIKELY	LIKELY	UNLIKELY	EXTREMELY UNLIKELY	NOT SURE

LOT DEPTH

- 2.4 *In the overhead sketch, the house on the left illustrates a Single Detached house on a Conventional 100 foot deep lot, with a front yard setback that is 20 feet deep and a back yard setback that is 25 feet deep. The house on the right represents the Alternative Standard of a 75 foot deep lot, with a front yard setback that is 10 feet deep and a back yard setback that is 20 feet deep.*

Singles: Assuming that both houses are the same size and that each meets your requirements, if the Single with the shorter 75' lot (right) was \$4000 less expensive than the Single with the Conventional 100' lot (left), how likely would you be to purchase the house with the shorter lot?

1	2	3	4	5
EXTREMELY LIKELY	LIKELY	UNLIKELY	EXTREMELY UNLIKELY	NOT SURE

Towns: Assuming that both Townhouses are the same size and that each meets your requirements, if the house with the shorter 75' lot (right) was \$2900 less expensive than the Townhouse with the Conventional 100' lot (left), how likely would you be to purchase the house with the shorter lot?

1	2	3	4	5
EXTREMELY LIKELY	LIKELY	UNLIKELY	EXTREMELY UNLIKELY	NOT SURE

Door-to-door separation is the distance between the front doors of 2 houses on opposite sides of the street. It includes 2 front yards and the street Right of Way between them. A street Right of Way (RoW) is the distance between 2 front lot lines on opposite sides of a street. It includes the paved street and land on each side of it for curbs, street lights, underground servicing, utilities and snow storage.

DOOR-TO-DOOR SEPARATION

- 2.5 *The top sketch illustrates a Conventional door-to-door separation. It is 106 feet wide and includes 20 foot deep front yards on each side, and a 66 foot wide right of way. The bottom sketch illustrates an Alternative door-to-door separation. It is 52 feet wide and includes 10 foot deep front yards on each side, and a 52 foot wide right of way.*

Assume that you are considering 2 houses. Both are the same size and on the same size lots, and each one meets your requirements. How likely would you be to purchase the house with the narrower door-to-door separation?

1	2	3	4	5
EXTREMELY LIKELY	LIKELY	UNLIKELY	EXTREMELY UNLIKELY	NOT SURE

RIGHT OF WAY

- 2.6 *A Conventional RoW is 66 feet wide, and includes 18 feet of land on each side of a 30 foot wide paved street. The Alternative RoW is 52 feet wide, and includes 13 feet of land on each side of a 26 foot wide paved street.*

Assume that you are considering 2 houses. Both are the same size and on the same size lots, and each one meets your requirements. If the house with the Alternative, narrower 52' wide RoW was \$800-\$1000 less expensive than the house on the Conventional 66' wide RoW, how likely would you be to purchase the house with the narrower RoW?

1	2	3	4	5
EXTREMELY LIKELY	LIKELY	UNLIKELY	EXTREMELY UNLIKELY	NOT SURE

TOTAL PACKAGE

- 2.7 **Singles:** *The top sketch illustrates a Single Detached house in a Conventional neighbourhood. The lot is 35 feet wide by 100 feet deep, the RoW is 66 feet wide. The sketch on the bottom illustrates a Single Detached house in an Alternative neighbourhood. The lot is 26 feet wide by 75 feet deep, with a RoW that is 52 feet wide.*

Assuming that both neighbourhoods are in a suitable location and that both houses are the same size and meet your requirements, if the house in the Alternative neighbourhood (bottom) was \$12,500 less expensive than the house in the Conventional neighbourhood (top), how likely are you to purchase the home in the Alternative neighbourhood?

1	2	3	4	5
EXTREMELY LIKELY	LIKELY	UNLIKELY	EXTREMELY UNLIKELY	NOT SURE

Towns: The top sketch illustrates a Townhouse in a Conventional neighbourhood. The lot is 20 feet wide by 100 feet deep, the RoW is 66 feet wide. The sketch on the bottom illustrates a Townhouse in an Alternative neighbourhood. The lot is 18 feet wide by 75 feet deep, with a RoW that is 52 feet wide.

Assuming that both neighbourhoods are in a suitable location and that both houses are the same size and meet your requirements, if the house in the Alternative neighbourhood (bottom) was \$5,500 less expensive than the house in the Conventional neighbourhood (top), how likely are you to purchase the home in the Alternative neighbourhood?

1	2	3	4	5
EXTREMELY LIKELY	LIKELY	UNLIKELY	EXTREMELY UNLIKELY	NOT

PART 3

This part of the survey considers various neighbourhood elements of Conventional and Alternative Communities.

- 3.1 Please rank from 1 to 10 the following facilities based on your desire for each to be within 5 minutes walking distance of the home you purchase - where 1 is the most desired and 10 is least desired. (Do not use the same number twice).

— Convenience Store	— Postal Outlet
— Dry Cleaner	— Recreation/Community Centre
— Day Care Facility	— Park/Tot Lot

- 3.2 When considering the home you purchase, please indicate which of the following facilities you would live either beside, behind or in front. (Check all that apply).

☐ Convenience Store	☐ Postal Outlet
☐ Dry Cleaner	☐ Recreation/Community Centre
☐ Day Care Facility	☐ Park/Tot Lot

- 3.3 If each of the following facilities were within 5 minutes walking distance of the home you purchase, please indicate how many times per month you would use each one, where:

A = Not at all	D = 4-6 times per month
B = Once a month	E = 7-10 times per month
C = 2-3 times per month	F = More than 10 times per month

— Convenience Store	— Postal Outlet
— Dry Cleaner	— Recreation/Community Centre
— Day Care Facility	— Park/Tot Lot

3.4 If a convenience store was 400 metres (1/4 mile) from the home you purchase, how would you be most likely to get there?

- | | |
|----------------------------------|--------------------------------------|
| ☐ By Car | ☐ By Walking |
| ☐ By Bus | ☐ Other _____ |
| ☐ By Bike | |

3.5 How important is it to you to build more compact, efficient communities with smaller homes, with the objective of conserving natural resources such as farmland, environmental areas, construction materials?

- | | | | | |
|------------------------|-----------|-------------|--------------------------|-------------|
| 1 | 2 | 3 | 4 | 5 |
| EXTREMELY
IMPORTANT | IMPORTANT | UNIMPORTANT | EXTREMELY
UNIMPORTANT | NOT
SURE |

PART 4

This section of the survey asks you to provide information that will help us establish profiles of potential consumers and their housing preferences.

4.1 What is your family status?

- ☐ Married, with child(ren) at home. How many? ____
- ☐ Married, with no children at home
- ☐ Single Parent. How many children? ____
- ☐ Single - no children at home
- ☐ Separated/Divorced/Widowed, with no children at home

4.2 What range does your age fall in?

- | | |
|-----------------------------------|------------------------------------|
| ☐ Under 25 | ☐ 45 - 49 |
| ☐ 25 - 29 | ☐ 50 - 54 |
| ☐ 30 - 34 | ☐ Over 55 |
| ☐ 35 - 39 | ☐ No Answer |
| ☐ 40 - 44 | |

4.3 Are you male or female?

- | | |
|-------------------------------|---------------------------------|
| ☐ Male | ☐ Female |
|-------------------------------|---------------------------------|

4.4 What is your total household income?

- | | |
|--|--|
| ☐ Under \$30,000 | ☐ \$ 80,000 - \$ 99,999 |
| ☐ \$30,000 - \$39,999 | ☐ \$100,000 - \$149,999 |
| ☐ \$40,000 - \$49,999 | ☐ Over \$150,000 |
| ☐ \$50,000 - \$59,999 | ☐ No Answer |
| ☐ \$60,000 - \$79,999 | |

4.5 Where do you live now?

Inside Greenbelt

- ☐ Ottawa East/Gloucester
- ☐ Ottawa Central
- ☐ Ottawa South
- ☐ Ottawa West/Nepean

Outside Greenbelt

- ☐ Orleans
- ☐ Barrhaven
- ☐ Kanata/Stittsville
- ☐ Rural Area
- ☐ Outside Ottawa-Carleton

4.6 How did you first hear about this Home Buyer's Forum?

- ☐ Ottawa Citizen
- ☐ CHEZ 106
- ☐ Community Newspaper
- ☐ Royal Bank
- ☐ Friend, Co-Worker, Relative
- ☐ Other _____

THANK YOU FOR TAKING THE TIME TO COMPLETE THIS SURVEY

MORE INPUT

Brethour Research will be organizing discussion groups to talk about Alternative development standards, new communities and house designs. Would you be interested in attending one of these meetings and sharing your ideas?

- ☐ Yes
- ☐ No
- ☐ Maybe - please call with more information

If yes, or maybe, please provide your name and phone number below and we will provide you with more information.

DOOR PRIZES

This survey also acts as your ticket for the prize draw. Please provide your name and phone number below.

PRIORITY REGISTRATION

Those who wish to receive further information when homes built using Alternative Development Standards become available, should check the box below. Please include your name, address and phone number. Only this information will be passed along to the appropriate sources - not the survey responses that you have provided in confidence.

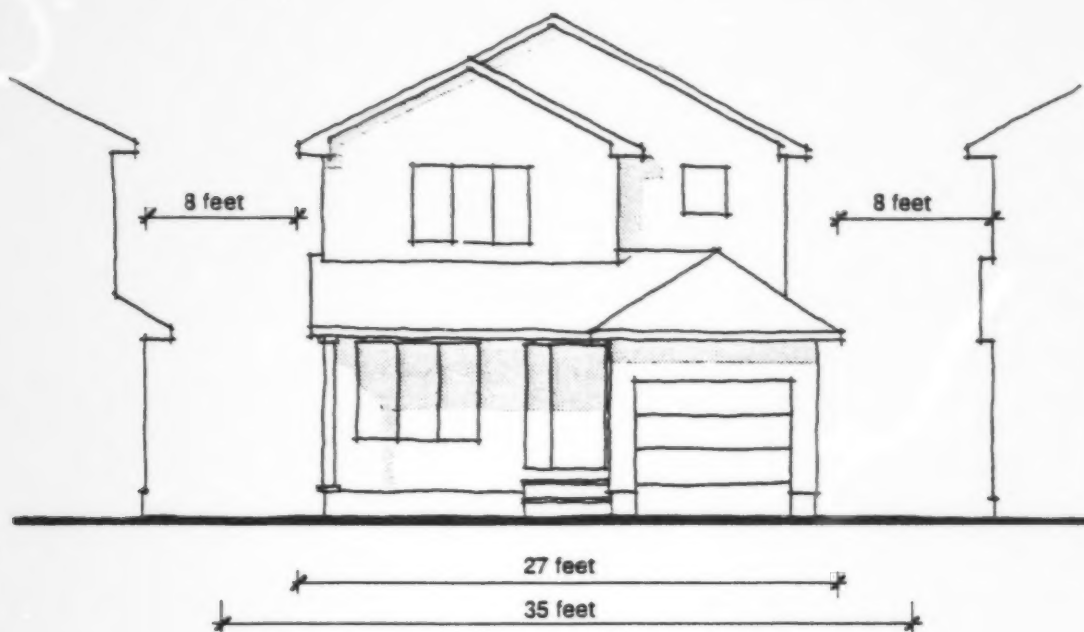
- ☐ Please add my name to the Priority Registration List

Name _____ Phone _____

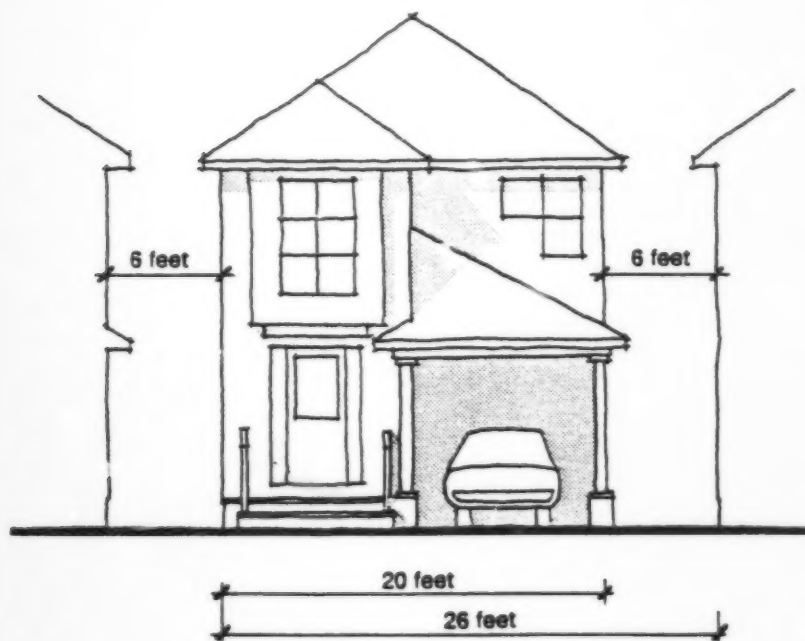
Address _____

APPENDIX 3

ILLUSTRATION OF CONVENTIONAL AND ALTERNATIVE STANDARDS

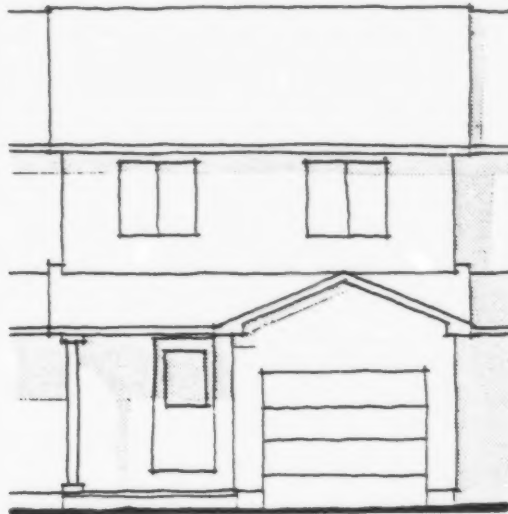


**CONVENTIONAL
SINGLE**



**ALTERNATIVE
SINGLE**

**CONVENTIONAL
TOWNHOUSE**

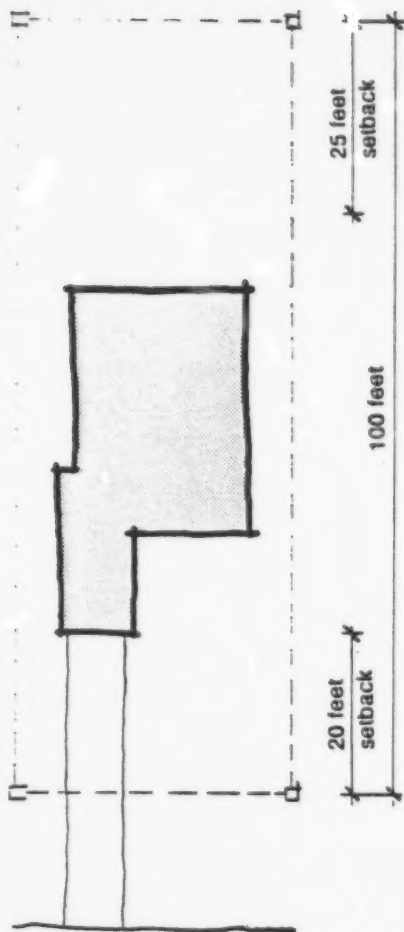


20 feet

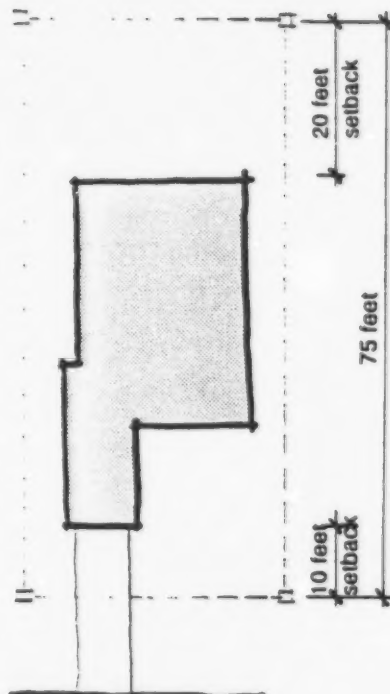
**ALTERNATIVE
TOWNHOUSE**



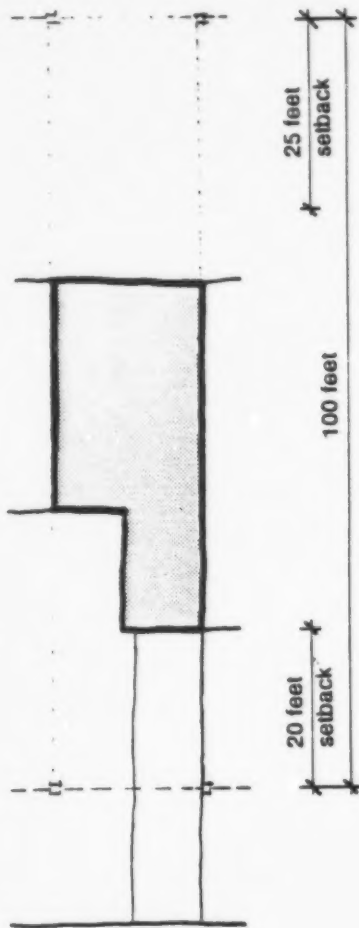
18 feet



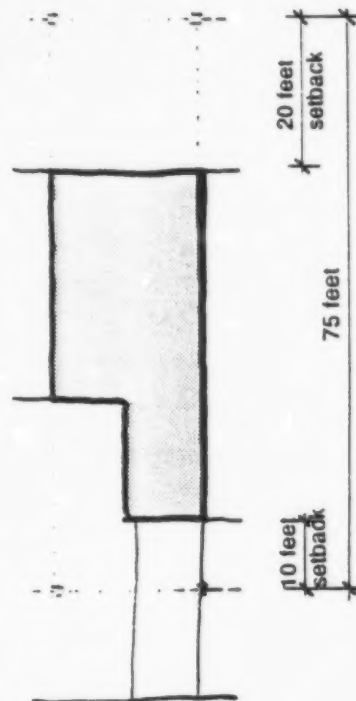
CONVENTIONAL
LOT DEPTH



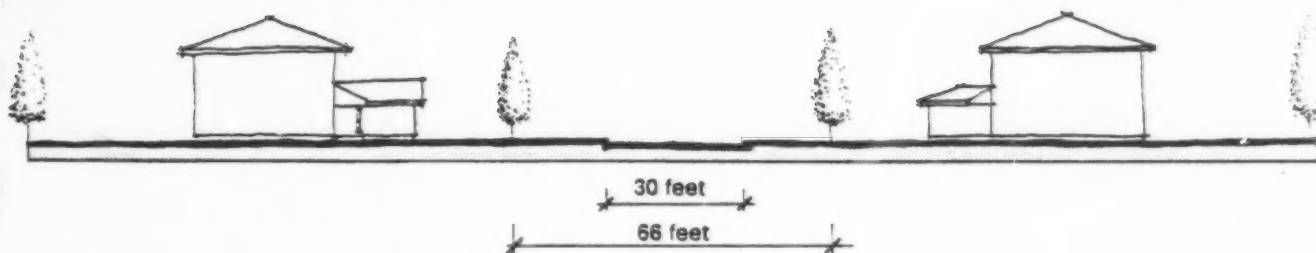
ALTERNATIVE
LOT DEPTH.



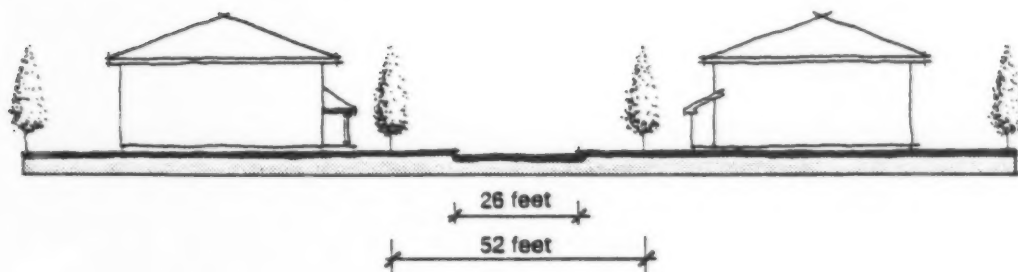
CONVENTIONAL
LOT DEPTH
TOWNHOUSE



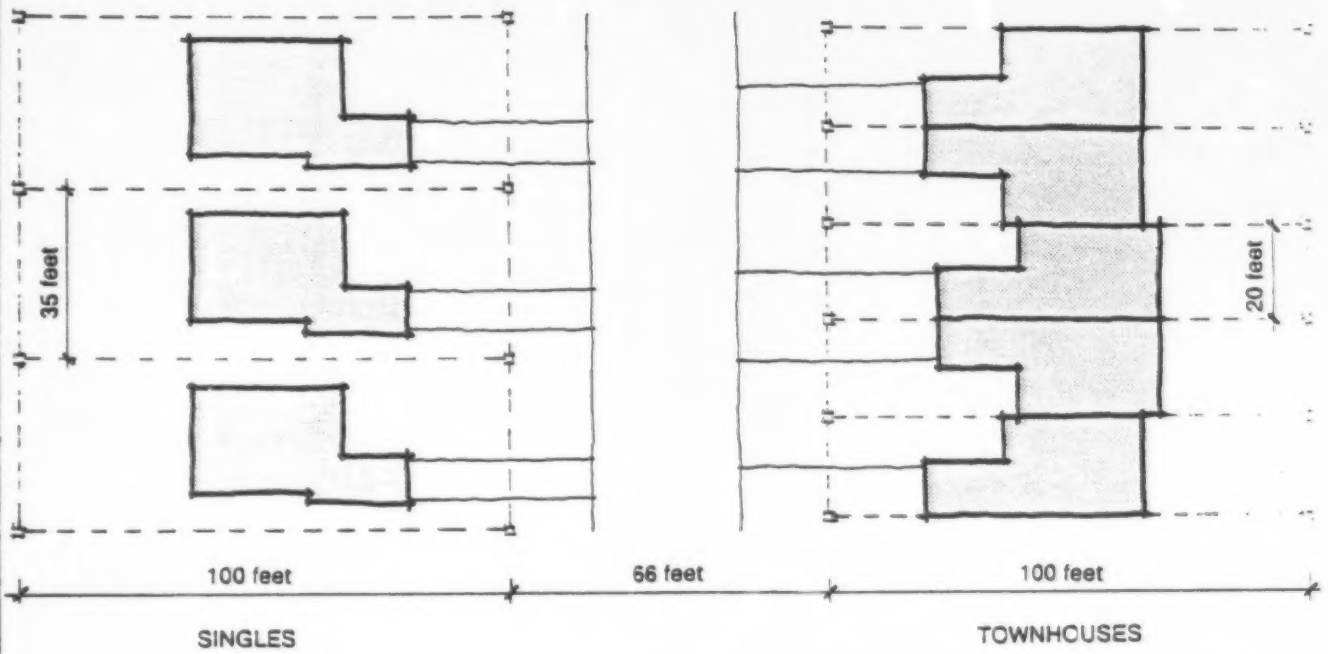
ALTERNATIVE
LOT DEPTH
TOWNHOUSE



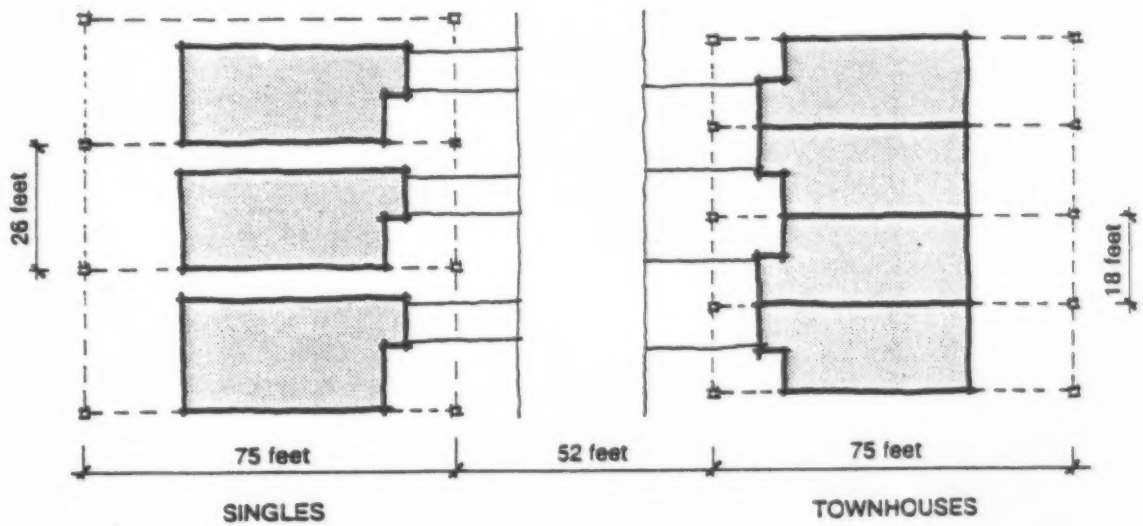
CONVENTIONAL
STREET WIDTH



ALTERNATIVE
STREET WIDTH



**CONVENTIONAL
STREETSCAPE**



**ALTERNATIVE
STREETSCAPE**

APPENDIX 4

QUESTIONNAIRE RESPONSE DISTRIBUTIONS



FREQUENCY DISTRIBUTION

PAGE 1

1) What type of residence do you live in now?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	49	32.0	32.0	32.0	Single
2	7	36.6	4.6	4.6	Semi
3	42	64.1	27.5	27.5	Town
4	51	97.4	33.3	33.3	Apt
5	4	100.0	2.6	2.6	Other
WA	2.70	153	100.0	100.0	100.0 TOTALS

2) What is your current housing situation?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	93	60.8	60.8	60.8	Rent
2	12	68.6	7.8	7.8	Parents
3	25	85.0	16.3	16.3	Own - 1
4	23	100.0	15.0	15.0	Own - 2+
WA	1.86	153	100.0	100.0	100.0 TOTALS

3) When do you intend to purchase a home?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	75	49.0	49.0	49.0	1 year
2	49	81.0	32.0	32.0	2 or 3
3	13	89.5	8.5	8.5	within 5 years
4	12	97.4	7.8	7.8	not sure
5	4	100.0	2.6	2.6	not within 5 years
WA	1.83	153	100.0	100.0	100.0 TOTALS

4) What type of home do you expect to purchase?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	82	53.6	53.6	53.6	Single
2	8	58.8	5.2	5.2	Semi
3	49	90.8	32.0	32.0	Frhold Town
4	8	96.1	5.2	5.2	Condo Town
5	0	96.1	0.0	0.0	Condo Apt
6	6	100.0	3.9	3.9	Other
WA	2.05	153	100.0	100.0	100.0 TOTALS

FREQUENCY DISTRIBUTION

PAGE 2

5) What size of home do you expect to purchase?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	5	3.3	3.3	3.3	<1000
2	57	40.5	37.3	37.3	1000-1400
3	39	66.0	25.5	25.5	1400-1800
4	28	84.3	18.3	18.3	1800-2200
5	8	89.5	5.2	5.2	>2200
6	16	100.0	10.5	10.5	Not Sure

WA	3.16	153	100.0	100.0	100.0 TOTALS

6) Number of bedrooms?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	1	0.7	0.7	0.7	1
2	42	28.1	27.5	27.5	2
3	101	94.1	66.0	66.0	3
4	9	100.0	5.9	5.9	4

WA	2.77	153	100.0	100.0	100.0 TOTALS

7) 2 Bedrooms, Expand?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	25	16.3	16.3	16.4	No
2	31	36.6	20.3	20.4	Probably not
3	48	68.0	31.4	31.6	Maybe
4	48	99.3	31.4	31.6	Yes
19	1	100.0	0.7	0.0	No response/Does not know

WA	2.78	153	100.0	100.0	100.0 TOTALS

8) Number of Bathrooms?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	18	11.8	11.8	11.8	1
2	77	62.1	50.3	50.3	1 1/2
3	38	86.9	24.8	24.8	2
4	17	98.0	11.1	11.1	2 1/2
5	3	100.0	2.0	2.0	3+

WA	2.41	153	100.0	100.0	100.0 TOTALS

FREQUENCY DISTRIBUTION

PAGE 3

9) Cars?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	2	1.3	1.3	1.3	0
2	84	56.2	54.9	54.9	1
3	63	97.4	41.2	41.2	2
4	4	100.0	2.6	2.6	3+
WA	2.45	153	100.0	100.0	100.0 TOTALS

10) Garage?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	1	0.7	0.7	0.7	No
2	39	26.1	25.5	25.7	Not necessarily
3	72	73.2	47.1	47.4	Yes-1
4	40	99.3	26.1	26.3	Yes-2
19	1	100.0	0.7	0.0	No response/Does not know
WA	2.99	153	100.0	100.0	100.0 TOTALS

11) Finsh Basement?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	13	8.5	8.5	8.5	No
2	26	25.5	17.0	17.0	Maybe
3	67	69.3	43.8	43.8	Yes-part
4	39	94.8	25.5	25.5	Yes-all
5	8	100.0	5.2	5.2	Not sure
WA	3.02	153	100.0	100.0	100.0 TOTALS

12) Grow Home?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	20	13.1	13.1	13.1	No
2	67	56.9	43.8	43.8	Maybe
3	66	100.0	43.1	43.1	Yes
WA	2.30	153	100.0	100.0	100.0 TOTALS

13) Elevation and Size?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	7	4.6	4.6	4.6	1, 700-800
2	91	64.1	59.5	59.5	2, 900-1400
3	16	74.5	10.5	10.5	3, 1200-2000
4	39	100.0	25.5	25.5	None of the above
WA	2.57	153	100.0	100.0	100.0 TOTALS

FREQUENCY DISTRIBUTION

PAGE 4

14) Community Appeal - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	14	9.2	9.2	9.2	1
2	23	24.2	15.0	15.0	2
3	20	37.3	13.1	13.1	3
4	40	63.4	26.1	26.1	4
5	35	86.3	22.9	22.9	5
6	21	100.0	13.7	13.7	6

WA 3.80 153 100.0 100.0 100.0 TOTALS

15) Location - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	70	45.8	45.8	45.8	1
2	32	66.7	20.9	20.9	2
3	28	85.0	18.3	18.3	3
4	12	92.8	7.8	7.8	4
5	10	99.3	6.5	6.5	5
6	1	100.0	0.7	0.7	6

WA 2.10 153 100.0 100.0 100.0 TOTALS

16) Exterior Elevation - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	3	2.0	2.0	2.0	1
2	3	3.9	2.0	2.0	2
3	10	10.5	6.5	6.5	3
4	18	22.2	11.8	11.8	4
5	46	52.3	30.1	30.1	5
6	73	100.0	47.7	47.7	6

WA 5.09 153 100.0 100.0 100.0 TOTALS

17) Interior Layout - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	33	21.6	21.6	21.6	1
2	43	49.7	28.1	28.1	2
3	33	71.2	21.6	21.6	3
4	26	88.2	17.0	17.0	4
5	12	96.1	7.8	7.8	5
6	6	100.0	3.9	3.9	6

WA 2.73 153 100.0 100.0 100.0 TOTALS

FREQUENCY DISTRIBUTION

PAGE 5

18) House Size - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	28	18.3	18.3	18.3	1
2	33	39.9	21.6	21.6	2
3	43	68.0	28.1	28.1	3
4	30	87.6	19.6	19.6	4
5	15	97.4	9.8	9.8	5
6	4	100.0	2.6	2.6	6

WA 2.89 153 100.0 100.0 100.0 TOTALS

19) Lot Size - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	8	5.2	5.2	5.2	1
2	21	19.0	13.7	13.7	2
3	25	35.3	16.3	16.3	3
4	23	50.3	15.0	15.0	4
5	32	71.2	20.9	20.9	5
6	44	100.0	28.8	28.8	6

WA 4.19 153 100.0 100.0 100.0 TOTALS

20) Monthly Payment

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	12	7.8	7.8	8.1	<\$800
2	42	35.3	27.5	28.2	\$800-1000
3	50	68.0	32.7	33.6	\$1000-1200
4	29	86.9	19.0	19.5	\$1200-1400
5	9	92.8	5.9	6.0	\$1400-1600
6	7	97.4	4.6	4.7	>\$1600
19	4	100.0	2.6	0.0	No response/Does not know

WA 3.01 153 100.0 100.0 100.0 TOTALS

21) Down Payment?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	5	3.3	3.3	3.3	<\$5000
2	36	26.8	23.5	23.7	\$5-10,000
3	45	56.2	29.4	29.6	\$10-20,000
4	33	77.8	21.6	21.7	\$20-50,000
5	19	90.2	12.4	12.5	>\$50,000
6	14	99.3	9.2	9.2	Not Sure
19	1	100.0	0.7	0.0	No response/Does not know

WA 3.44 153 100.0 100.0 100.0 TOTALS

FREQUENCY DISTRIBUTION

PAGE 6

22) Maximum Price?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	1	0.7	0.7	0.7	<\$80,000
2	16	11.1	10.5	10.5	\$80-100,000
3	40	37.3	26.1	26.1	\$100-120,000
4	23	52.3	15.0	15.0	\$120-140,000
5	32	73.2	20.9	20.9	\$140-160,000
6	15	83.0	9.8	9.8	\$160-180,000
7	13	91.5	8.5	8.5	\$180-200,000
8	4	94.1	2.6	2.6	>\$200,000
9	9	100.0	5.9	5.9	Not Sure
WA 4.57	153	100.0	100.0	100.0	TOTALS

23) Ottawa East/Glouc

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	131	85.6	85.6	85.6	No
2	22	100.0	14.4	14.4	Yes
WA 1.14	153	100.0	100.0	100.0	TOTALS

24) Ottawa Central

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	123	80.4	80.4	80.4	No
2	30	100.0	19.6	19.6	Yes
WA 1.20	153	100.0	100.0	100.0	TOTALS

25) Ottawa South

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	113	73.9	73.9	73.9	No
2	40	100.0	26.1	26.1	Yes
WA 1.26	153	100.0	100.0	100.0	TOTALS

26) Ottawa West/Nepean

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	81	52.9	52.9	52.9	No
2	72	100.0	47.1	47.1	Yes
WA 1.47	153	100.0	100.0	100.0	TOTALS

FREQUENCY DISTRIBUTION

PAGE 7

27) Orleans?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	128	83.7	83.7	83.7	No
2	25	100.0	16.3	16.3	Yes
WA 1.16	153	100.0	100.0	100.0	TOTALS

28) Barrhaven?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	115	75.2	75.2	75.2	No
2	38	100.0	24.8	24.8	Yes
WA 1.25	153	100.0	100.0	100.0	TOTALS

29) Kanata/Stittsville?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	114	74.5	74.5	74.5	No
2	39	100.0	25.5	25.5	Yes
WA 1.25	153	100.0	100.0	100.0	TOTALS

30) Rural Area?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	121	79.1	79.1	79.1	No
2	32	100.0	20.9	20.9	Yes
WA 1.21	153	100.0	100.0	100.0	TOTALS

31) Outside Ott-Carleton?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	131	85.6	85.6	85.6	No
2	22	100.0	14.4	14.4	Yes
WA 1.14	153	100.0	100.0	100.0	TOTALS

32) Not Sure?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	134	87.6	87.6	87.6	No
2	19	100.0	12.4	12.4	Yes
WA 1.12	153	100.0	100.0	100.0	TOTALS

FREQUENCY DISTRIBUTION

PAGE 8

33) Commute Distance

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY				

WA	0.00	153	100.0	100.0	100.0	TOTALS			
Average =		24	Median =	20	Std. dev. =	16	Min =	0	Max = 100

34) Lot Width - Singles

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY	
1	32	20.9	20.9	21.3	Extremely Likely	
2	46	51.0	30.1	30.7	Likely	
3	42	78.4	27.5	28.0	Unlikely	
4	24	94.1	15.7	16.0	Extremely Unlikely	
5	6	98.0	3.9	4.0	Not Sure	
19	3	100.0	2.0	0.0	No response/Does not know	
WA	2.51	153	100.0	100.0	100.0	TOTALS

35) Lot Width - Towns

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY	
1	26	17.0	17.0	19.0	Extremely Likely	
2	50	49.7	32.7	36.5	Likely	
3	35	72.5	22.9	25.5	Unlikely	
4	20	85.6	13.1	14.6	Extremely Unlikely	
5	6	89.5	3.9	4.4	Not Sure	
19	16	100.0	10.5	0.0	No response/Does not know	
WA	2.49	153	100.0	100.0	100.0	TOTALS

36) Front Yard?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY	
1	29	19.0	19.0	19.0	Extremely Likely	
2	65	61.4	42.5	42.5	Likely	
3	27	79.1	17.6	17.6	Unlikely	
4	23	94.1	15.0	15.0	Extremely Unlikely	
5	9	100.0	5.9	5.9	Not Sure	
WA	2.46	153	100.0	100.0	100.0	TOTALS

37) Back Yard?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	19	12.4	12.4	12.4	Extremely Likely
2	48	43.8	31.4	31.4	Likely
3	47	74.5	30.7	30.7	Unlikely
4	33	96.1	21.6	21.6	Extremely Unlikely
5	6	100.0	3.9	3.9	Not Sure

WA	2.73	153	100.0	100.0	100.0 TOTALS

38) Lot Depth - Singles

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	24	15.7	15.7	16.0	Extremely Likely
2	53	50.3	34.6	35.3	Likely
3	36	73.9	23.5	24.0	Unlikely
4	19	86.3	12.4	12.7	Extremely Unlikely
5	18	98.0	11.8	12.0	Not Sure
19	3	100.0	2.0	0.0	No response/Does not know

WA	2.69	153	100.0	100.0	100.0 TOTALS

39) Lot Depth - Towns

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	19	12.4	12.4	13.9	Extremely Likely
2	53	47.1	34.6	38.7	Likely
3	32	68.0	20.9	23.4	Unlikely
4	17	79.1	11.1	12.4	Extremely Unlikely
5	16	89.5	10.5	11.7	Not Sure
19	16	100.0	10.5	0.0	No response/Does not know

WA	2.69	153	100.0	100.0	100.0 TOTALS

40) Door-to-door Separation?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	21	13.7	13.7	13.8	Extremely Likely
2	57	51.0	37.3	37.5	Likely
3	47	81.7	30.7	30.9	Unlikely
4	22	96.1	14.4	14.5	Extremely Unlikely
5	5	99.3	3.3	3.3	Not Sure
19	1	100.0	0.7	0.0	No response/Does not know

WA	2.56	153	100.0	100.0	100.0 TOTALS

41) Right of Way?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	17	11.1	11.1	11.1	Extremely Likely
2	62	51.6	40.5	40.5	Likely
3	53	86.3	34.6	34.6	Unlikely
4	15	96.1	9.8	9.8	Extremely Unlikely
5	6	100.0	3.9	3.9	Not Sure

WA 2.55	153	100.0	100.0	100.0	TOTALS

42) Total Package - Singles

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	32	20.9	20.9	21.3	Extremely Likely
2	67	64.7	43.8	44.7	Likely
3	30	84.3	19.6	20.0	Unlikely
4	9	90.2	5.9	6.0	Extremely Unlikely
5	12	98.0	7.8	8.0	Not Sure
19	3	100.0	2.0	0.0	No response/Does not know

WA 2.35	153	100.0	100.0	100.0	TOTALS

43) Total Package - Towns

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	18	11.8	11.8	13.0	Extremely Likely
2	61	51.6	39.9	44.2	Likely
3	38	76.5	24.8	27.5	Unlikely
4	11	83.7	7.2	8.0	Extremely Unlikely
5	10	90.2	6.5	7.2	Not Sure
19	15	100.0	9.8	0.0	No response/Does not know

WA 2.52	153	100.0	100.0	100.0	TOTALS

44) Convenience Store - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	58	37.9	37.9	37.9	1
2	30	57.5	19.6	19.6	2
3	27	75.2	17.6	17.6	3
4	22	89.5	14.4	14.4	4
5	9	95.4	5.9	5.9	5
6	7	100.0	4.6	4.6	6

WA 2.44	153	100.0	100.0	100.0	TOTALS

45) Dry Cleaner - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	2	1.3	1.3	1.3	1
2	6	5.2	3.9	3.9	2
3	10	11.8	6.5	6.5	3
4	18	23.5	11.8	11.8	4
5	51	56.9	33.3	33.3	5
6	66	100.0	43.1	43.1	6

WA	5.01	153	100.0	100.0	100.0 TOTALS

46) Day Care Facility - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	8	5.2	5.2	5.2	1
2	13	13.7	8.5	8.5	2
3	23	28.8	15.0	15.0	3
4	22	43.1	14.4	14.4	4
5	22	57.5	14.4	14.4	5
6	65	100.0	42.5	42.5	6

WA	4.52	153	100.0	100.0	100.0 TOTALS

47) Postal Outlet - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	11	7.2	7.2	7.2	1
2	17	18.3	11.1	11.1	2
3	37	42.5	24.2	24.2	3
4	39	68.0	25.5	25.5	4
5	35	90.8	22.9	22.9	5
6	14	100.0	9.2	9.2	6

WA	3.73	153	100.0	100.0	100.0 TOTALS

48) Rec/Comm Centre - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	30	19.6	19.6	19.6	1
2	49	51.6	32.0	32.0	2
3	26	68.6	17.0	17.0	3
4	30	88.2	19.6	19.6	4
5	11	95.4	7.2	7.2	5
6	7	100.0	4.6	4.6	6

WA	2.76	153	100.0	100.0	100.0 TOTALS

FREQUENCY DISTRIBUTION

PAGE 12

49) Park/Tot Lot - Rank

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	42	27.5	27.5	27.5	1
2	35	50.3	22.9	22.9	2
3	30	69.9	19.6	19.6	3
4	17	81.0	11.1	11.1	4
5	21	94.8	13.7	13.7	5
6	8	100.0	5.2	5.2	6

WA	2.76	153	100.0	100.0	100.0 TOTALS

50) Convenience Store?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	124	81.0	81.0	82.1	No
2	27	98.7	17.6	17.9	Yes
19	2	100.0	1.3	0.0	No response/Does not know

WA	1.18	153	100.0	100.0	100.0 TOTALS

51) Dry Cleaner?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	140	91.5	91.5	91.5	No
2	13	100.0	8.5	8.5	Yes

WA	1.08	153	100.0	100.0	100.0 TOTALS

52) Day Care Facility

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	118	77.1	77.1	77.1	No
2	35	100.0	22.9	22.9	Yes

WA	1.23	153	100.0	100.0	100.0 TOTALS

53) Postal Outlet

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	111	72.5	72.5	72.5	No
2	42	100.0	27.5	27.5	Yes

WA	1.27	153	100.0	100.0	100.0 TOTALS

FREQUENCY DISTRIBUTION

PAGE 13

54) Rec/Comm Centre?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	87	56.9	56.9	56.9	No
2	66	100.0	43.1	43.1	Yes

WA 1.43	153	100.0	100.0	100.0	TOTALS

55) Park/Tot Lot

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	41	26.8	26.8	26.8	No
2	112	100.0	73.2	73.2	Yes

WA 1.73	153	100.0	100.0	100.0	TOTALS

56) Convenience Store - Use

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	6	3.9	3.9	3.9	A Not at all
2	10	10.5	6.5	6.5	B 1/m
3	20	23.5	13.1	13.1	C 2-3/m
4	32	44.4	20.9	20.9	D 4-6/m
5	32	65.4	20.9	20.9	E 7-10/m
6	53	100.0	34.6	34.6	F 10+/m

WA 4.52	153	100.0	100.0	100.0	TOTALS

57) Dry Cleaner - Use

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	50	32.7	32.7	32.7	A Not at all
2	65	75.2	42.5	42.5	B 1/m
3	28	93.5	18.3	18.3	C 2-3/m
4	8	98.7	5.2	5.2	D 4-6/m
5	2	100.0	1.3	1.3	E 7-10/m
6	0	100.0	0.0	0.0	F 10+/m

WA 2.00	153	100.0	100.0	100.0	TOTALS

58) Daycare - Use

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	124	81.0	81.0	81.0	A Not at all
2	2	82.4	1.3	1.3	B 1/m
3	0	82.4	0.0	0.0	C 2-3/m
4	1	83.0	0.7	0.7	D 4-6/m
5	0	83.0	0.0	0.0	E 7-10/m
6	26	100.0	17.0	17.0	F 10+/m

WA	1.88	153	100.0	100.0	100.0 TOTALS

59) Postal Outlet - Use

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	8	5.2	5.2	5.2	A Not at all
2	40	31.4	26.1	26.1	B 1/m
3	47	62.1	30.7	30.7	C 2-3/m
4	32	83.0	20.9	20.9	D 4-6/m
5	7	87.6	4.6	4.6	E 7-10/m
6	19	100.0	12.4	12.4	F 10+/m

WA	3.31	153	100.0	100.0	100.0 TOTALS

60) Rec/Comm Centre - Use

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	15	9.8	9.8	9.8	A Not at all
2	25	26.1	16.3	16.3	B 1/m
3	28	44.4	18.3	18.3	C 2-3/m
4	35	67.3	22.9	22.9	D 4-6/m
5	24	83.0	15.7	15.7	E 7-10/m
6	26	100.0	17.0	17.0	F 10+/m

WA	3.69	153	100.0	100.0	100.0 TOTALS

61) Park/Tot Lot - Use

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	26	17.0	17.0	17.0	A Not at all
2	7	21.6	4.6	4.6	B 1/m
3	27	39.2	17.6	17.6	C 2-3/m
4	29	58.2	19.0	19.0	D 4-6/m
5	22	72.5	14.4	14.4	E 7-10/m
6	42	100.0	27.5	27.5	F 10+/m

WA	3.92	153	100.0	100.0	100.0 TOTALS

62) Local Transport?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	39	25.5	25.5	25.5	Car
2	1	26.1	0.7	0.7	Bus
3	15	35.9	9.8	9.8	Bike
4	96	98.7	62.7	62.7	Walk
5	2	100.0	1.3	1.3	Other

WA 3.14	153	100.0	100.0	100.0	TOTALS

63) Importance of Env'l Communities?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	26	17.0	17.0	17.0	Extremely Important
2	74	65.4	48.4	48.4	Important
3	25	81.7	16.3	16.3	Unimportant
4	7	86.3	4.6	4.6	Extremely Unimportant
5	21	100.0	13.7	13.7	Not Sure

WA 2.50	153	100.0	100.0	100.0	TOTALS

64) Family Status

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	35	22.9	22.9	23.0	Married w/kids
2	57	60.1	37.3	37.5	Married no kids
3	4	62.7	2.6	2.6	Single Parent
4	46	92.8	30.1	30.3	Single
5	10	99.3	6.5	6.6	Sep/Div/Wid
19	1	100.0	0.7	0.0	No response/Does not know

WA 2.60	153	100.0	100.0	100.0	TOTALS

65) Number of Children

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	113	73.9	73.9	74.3	0
2	18	85.6	11.8	11.8	1
3	15	95.4	9.8	9.9	2
4	4	98.0	2.6	2.6	3
5	2	99.3	1.3	1.3	4 or more
19	1	100.0	0.7	0.0	No response/Does not know

WA 1.45	153	100.0	100.0	100.0	TOTALS

66) Age

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	22	14.4	14.4	14.4	<25
2	37	38.6	24.2	24.2	25-29
3	43	66.7	28.1	28.1	30-34
4	19	79.1	12.4	12.4	35-39
5	11	86.3	7.2	7.2	40-44
6	2	87.6	1.3	1.3	45-49
7	3	89.5	2.0	2.0	50-54
8	14	98.7	9.2	9.2	55+
9	2	100.0	1.3	1.3	No Answer

WA	3.39	153	100.0	100.0	100.0 TOTALS

67) Gender?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	84	54.9	54.9	54.9	Male
2	69	100.0	45.1	45.1	Female

WA	1.45	153	100.0	100.0	100.0 TOTALS

68) Household Income?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	9	5.9	5.9	5.9	<30,000
2	18	17.6	11.8	11.8	\$30,-40,000
3	32	38.6	20.9	20.9	\$40-50,000
4	24	54.2	15.7	15.7	\$50-60,000
5	39	79.7	25.5	25.5	\$60-80,000
6	15	89.5	9.8	9.8	\$80-100,000
7	2	90.8	1.3	1.3	\$100-150,000
8	1	91.5	0.7	0.7	>\$150,000
9	13	100.0	8.5	8.5	No Answer

WA	4.32	153	100.0	100.0	100.0 TOTALS

FREQUENCY DISTRIBUTION

PAGE 17

69) Where do you live?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	13	8.5	8.5	8.5	Ottawa East/Glouc.
2	29	27.5	19.0	19.0	Ottawa Central
3	25	43.8	16.3	16.3	Ottawa South
4	51	77.1	33.3	33.3	Ottawa West/Nepean
5	5	80.4	3.3	3.3	Orleans
6	9	86.3	5.9	5.9	Barrhaven
7	7	90.8	4.6	4.6	Kanata/Stitts
8	5	94.1	3.3	3.3	Rural Area
9	9	100.0	5.9	5.9	Outside O-C

WA	3.92	153	100.0	100.0	100.0 TOTALS

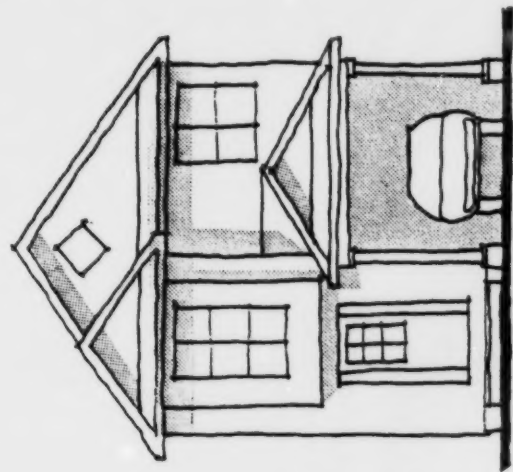
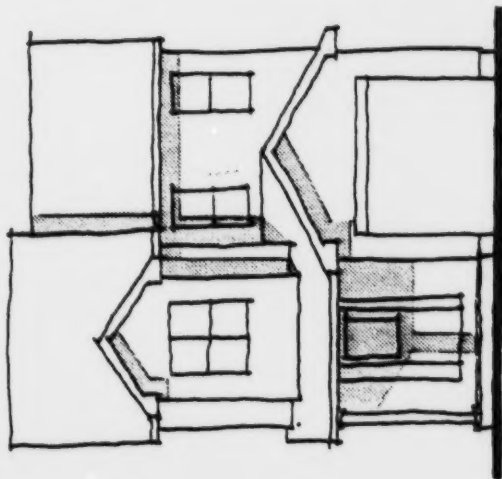
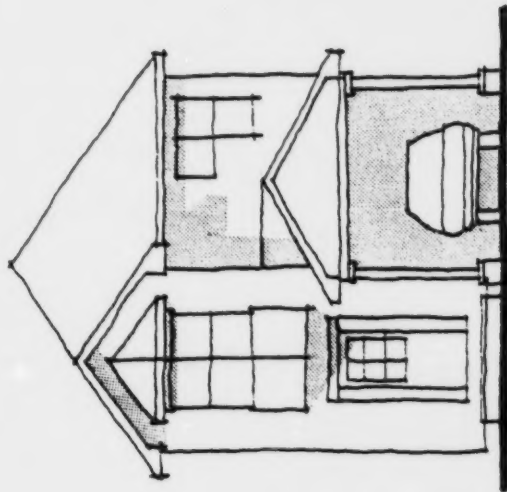
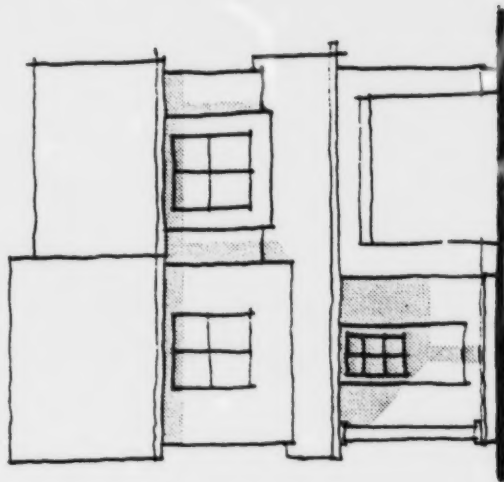
70) How did you hear about Forum?

#	FREQ	CUM%	NORM%	REV%	RESPONSE CATEGORY
1	95	62.1	62.1	62.1	Citizen
2	16	72.5	10.5	10.5	Chez 106
3	2	73.9	1.3	1.3	Comm. Paper
4	15	83.7	9.8	9.8	Royal Bank
5	24	99.3	15.7	15.7	Word-of-Mouth
6	1	100.0	0.7	0.7	Other

WA	2.08	153	100.0	100.0	100.0 TOTALS

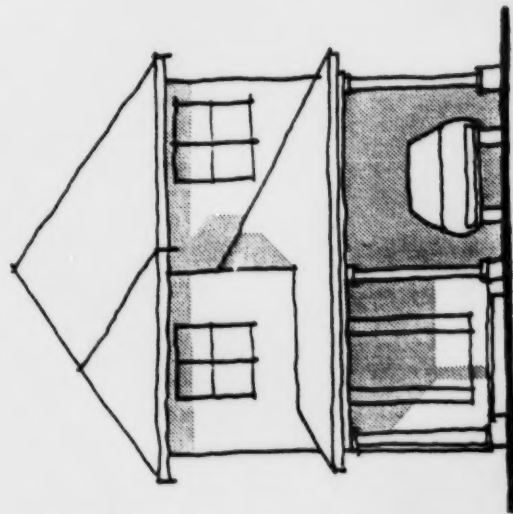
APPENDIX 5

ADS HOUSING DESIGNS



SINGLES
OPTIONAL ELEVATIONS

NICHOLS VANDEN BERG ARCHITECTS



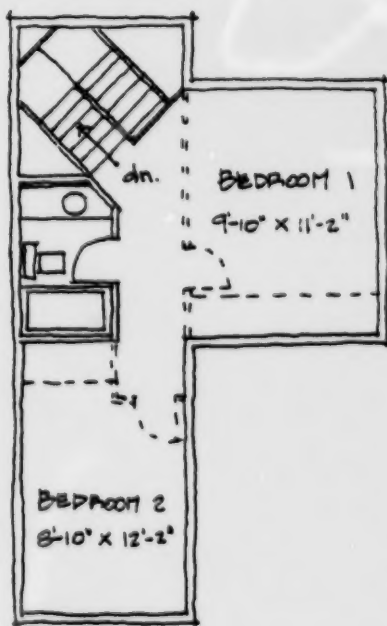
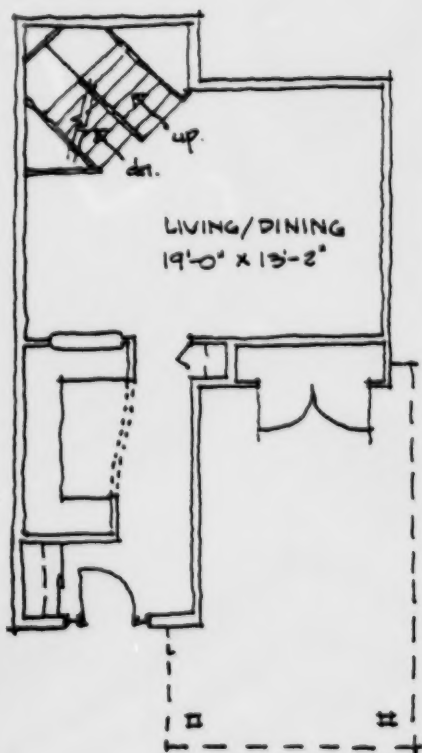


SINGLE

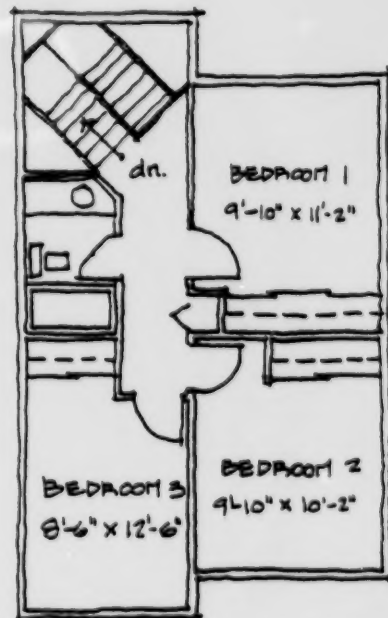
910 sq. ft.

2 BEDROOM

NICHOLS VANDEN BERG ARCHITECTS



2 bedroom



Optional 3 bedroom

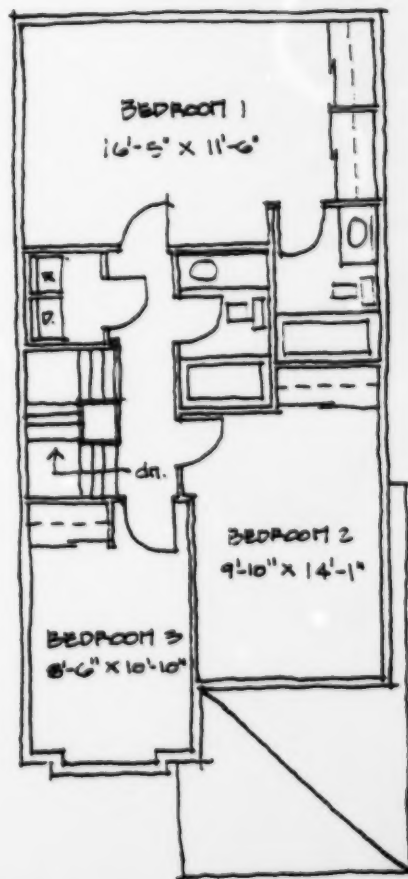
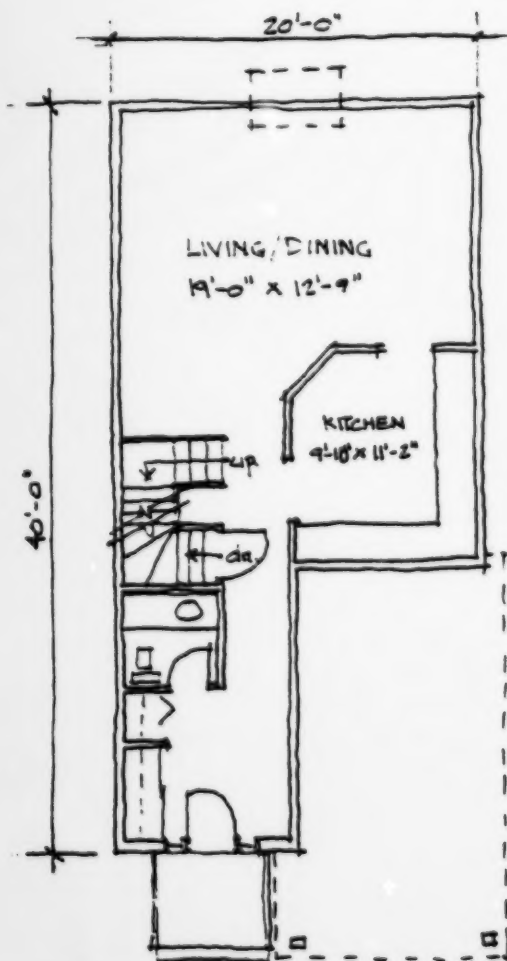


SINGLE

1400 sq. ft.

3 BEDROOM

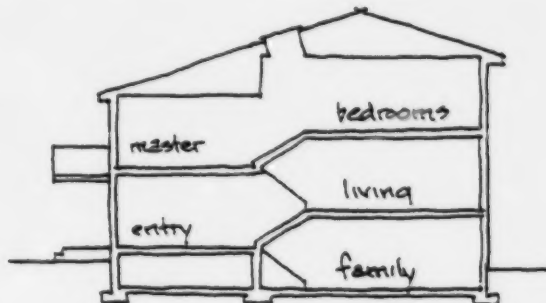
NICHOLS VANDEN BERG ARCHITECTS



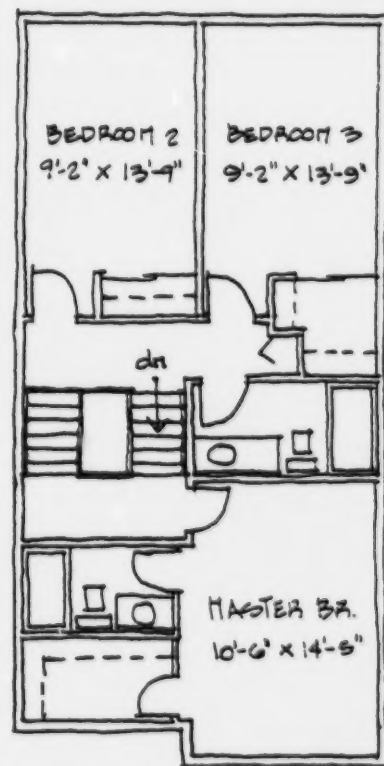
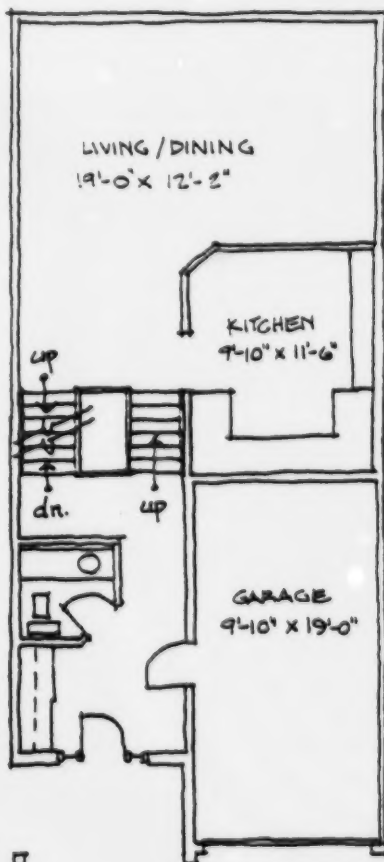
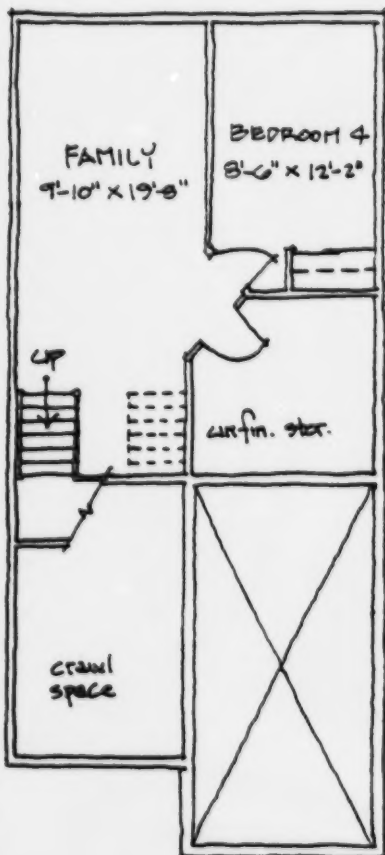


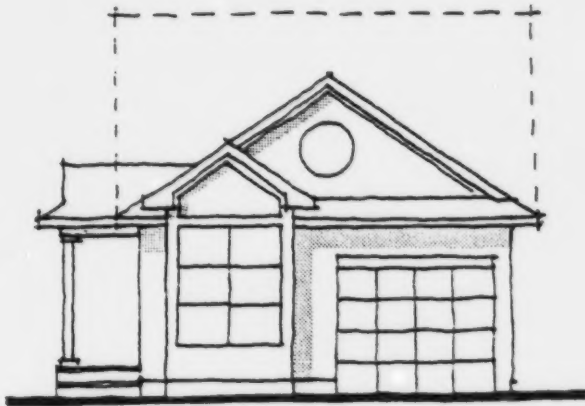
SINGLE

1800 sq. ft. finished
4 BEDROOM



NICHOLS VANDEN BERG ARCHITECTS

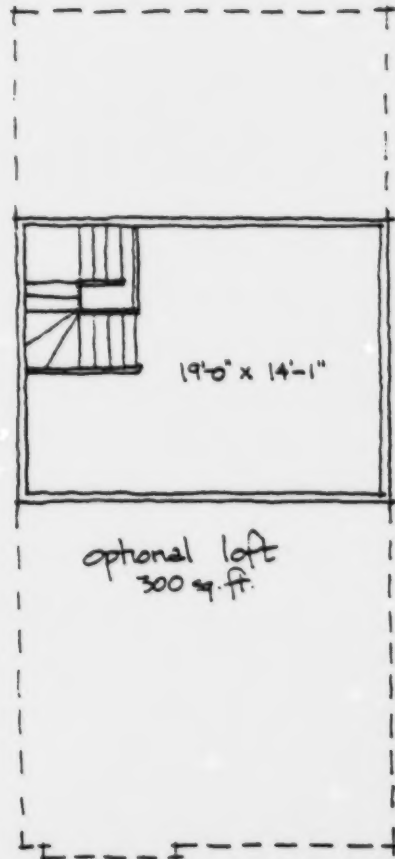
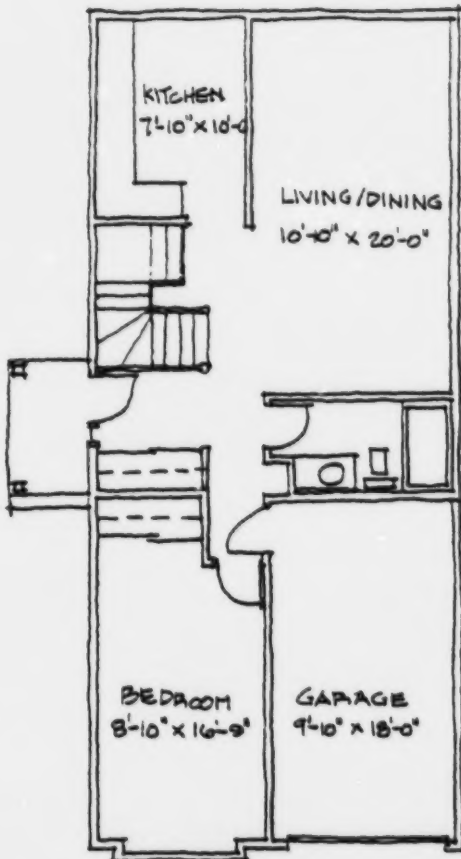




BUNGALOW

710 sq. ft.
1 BEDROOM

NICHOLS VANDEN BERG ARCHITECTS



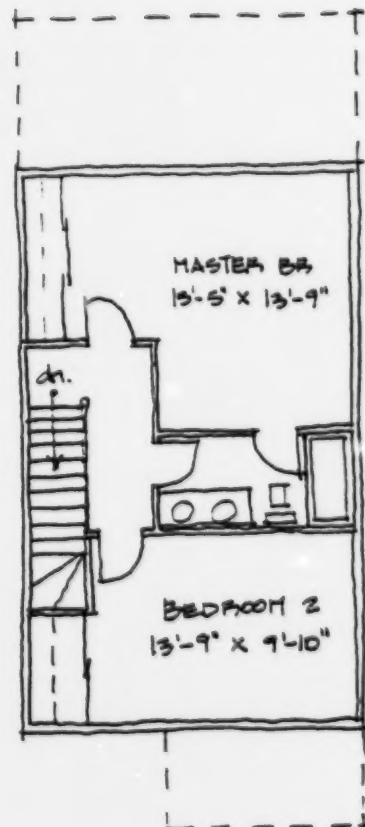
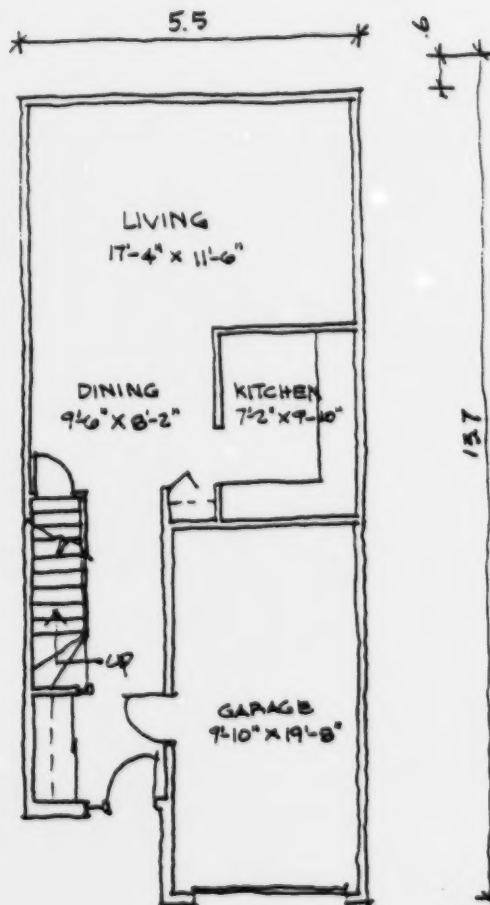


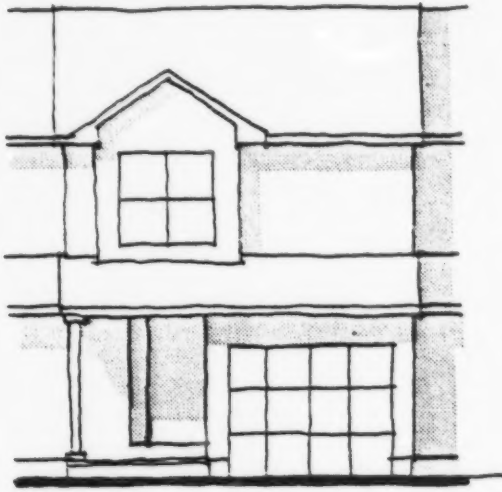
TOWNHOUSE

1080 sq. ft.

2 BEDROOM

NICHOLS VANDEN BERG ARCHITECTS

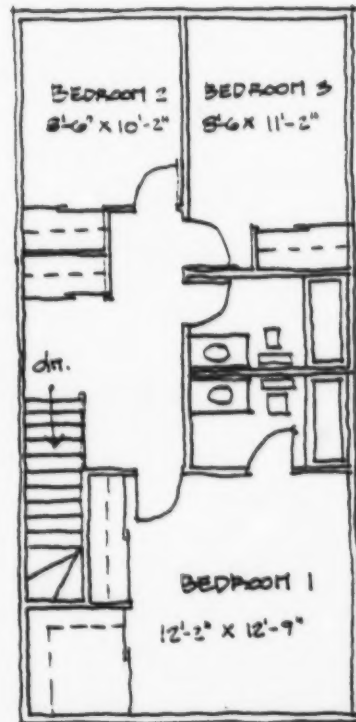
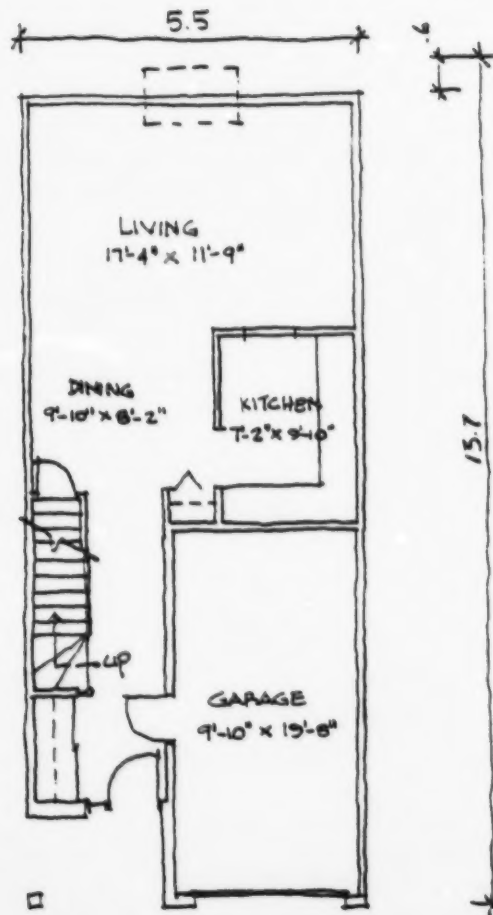


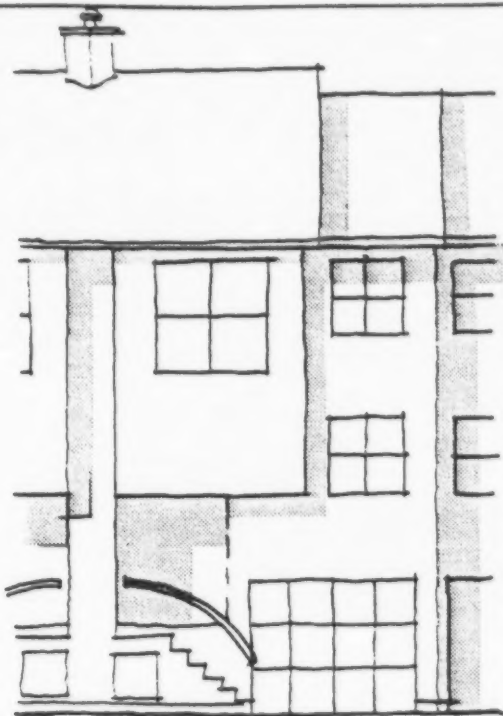


TOWNHOUSE

1225 sq. ft.
3 BEDROOM

NICHOLS VANDEN BERG ARCHITECTS





TOWNHOUSE

1300 sq. ft. + 200 family

3 BEDROOM

NICHOLS VANDEN BERG ARCHITECTS

